

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**



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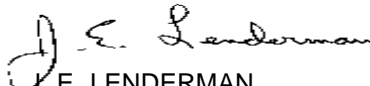
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FOREWORD

1 January 2001

1. This manual serves as a detailed organizational manual, a guide for the conduct of interservice training studies and reviews, and as a supplement to the Interservice Training Regulation (AR 351-9, OPNAVINST 1500.27E, MCO 1580.7D, and AFI 36-2230(I)). It specifies the processes necessary to complete an interservice training study from nomination to implementation. It also explains in detail, the regulations, requirements, policies, and procedures, and explains the terms used, but not defined, in the Interservice Training Regulation.
2. Comments or questions concerning this manual or the ITRO process are welcome.
3. Recommendations or requests for official changes to this manual must be submitted to the Chairman, Procedures/Directives Committee. Recommendations or requests for changes originated by another committee should be staffed by that committee, for concurrence by all Services, prior to submission to the Procedures/Directives Committee. All other recommendations or requests may be submitted directly to the Procedures/Directives Committee, who will accomplish staffing to the Service ITRO offices if appropriate. The Steering Committee is the approving authority for changes to this manual.
4. This manual supersedes previous editions and has been revised extensively. The following is a summary of the significant changes:
 - ?? The complete ITRO organization is detailed in Chapter 2, to include permanent and standing committees.
 - ?? Chapter 3, entirely rewritten, is a step-by-step procedural outline for Quick Look Group (QLG) and Detailed Analysis Group (DAG).
 - ?? A new Chapter 4 has been added which outlines all administrative requirements for ITRO studies, and provides formats for all ITRO reports. An ITRO Form 3 has been created to record the scope of each ITRO study or review.
 - ?? Chapter 5 sets forth procedures for the life-cycle maintenance processes and procedures.
 - ?? A new Chapter 6 reflects newly established budgetary guidelines, called Resourcing.
 - ?? Quick Look forms have been modified. The former ITRO Form 1 is now two Forms: 1 and 1A. Form 1 is for Service use and Form 1A is for QLG and DAG use.
 - ?? Chapters 7, 8 and 9, Manpower, Facilities and Cost Analysis Procedures, have all been rewritten. Chapter 9 now contains a sample Cost Report.
 - ?? Chapter 10 is a new addition to the manual and has been added to provide background and outline the ITRO Study Process as it relates to Health Care.
 - ?? A revised Interservice Training Regulation has been approved by ITRO with an effective date of 28 Sep 98.
 - ?? Appendix B contains all forms needed by the Subject Matter Experts (SMEs) to conduct an ITRO study.
 - ?? Appendix C is the new ITRO Staff Action Processing Form.
 - ?? Appendix D contains a sample Memorandum of Agreement (MOA).
 - ?? The Glossary at Appendix F no longer duplicates terms contained in the Interservice Training Regulation.

FOR THE STEERING COMMITTEE:


J. E. LENDERMAN
Colonel, U. S. Marine Corps
Chairman

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Chapter 1

INTRODUCTION

1. **Vision.** To identify and establish the most efficient and effective interservice training opportunities for soldiers, sailors, airmen and Marines.

2. **Background.** Since 1972, the Services have participated in a voluntary process through the Interservice Training Review Organization (ITRO). Its mission is to achieve training efficiencies through the consolidation and/or collocation of common training, when deemed in the best interest of all participants. ITRO is the means by which the Services voluntarily coordinate interservice training. Chapter 2 provides a detailed explanation of the ITRO organization.

3. **Authority.** The ITRO is established under the provisions of the Interservice Training Regulation, AR 351-9, OPNAVINST 1500.27E, MCO 1580.7D and AFI 36-2230(I). The Interservice Training Regulation does not abrogate the Services' authority and responsibility under Title 10, U.S.C.

4. **Study vs. Review.** Whereas all ITRO studies are reviews, throughout this manual, the term *study* will generally refer to a formal process through which two or more Services consider the consolidation or collocation of a specific type of training. *Reviews*, on the other hand, generally refer to an examination of existing ITRO training.

5. **Goal.** The goal of ITRO is the elimination of unnecessary duplication and training redundancy without negatively impacting on training quality. Where feasible, ITRO will attempt to develop cost-effective, multi-Service training at a single site. ITRO training consolidations or collocations are designed to improve training effectiveness, while maintaining or improving combat readiness, and eliminating or reducing infrastructure, thus reducing overall cost to the Department of Defense and the U. S. Coast Guard.

a. A systems approach will be used to accomplish the ITRO goal. Studies and reviews may include all courses related to an occupational field or functional training area, or it may be limited to a single specialty, course, or type of training. Each Service's training skills' requirements (including knowledge and abilities) for the particular functional training area under review, attained as a result of attending training, will be reviewed for the purpose of creating an interservice curriculum. The study will consider, but is not limited to, factors such as cost, manpower, and infrastructure. The installation and service-wide impacts of the study must also be addressed.

b. A long-term perspective is essential for optimum out year training efficiencies; short-term/initial start-up costs should not detract from this perspective.

c. Study recommendations will be consistent with the readiness, responsibilities, and requirements of the Services. Likewise, a process (Chapter 3) is in place to facilitate timely and thorough studies. The participants in the process will be accountable throughout the life cycle of a specific study. They are empowered to ensure continuous improvement of the DOD training effort.

6. **Objectives**

a. Assist the Services' training commands by performing studies directed toward improving common training.

b. Review training, education, and related activities to increase effectiveness and efficiency through course consolidation or collocation, standardization of instruction, and administrative and management improvement.

c. Serve as a forum for the interchange of training technology, information and ideas.

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Chapter 2

ORGANIZATION AND RESPONSIBILITIES

1. **General.** The interservice training review effort is guided by and achieved through a structure of boards and committees (see Figure 2-1). The following paragraphs describe and outline the responsibilities of those boards and committees.

2. **Executive Board (EB).** The EB governs the ITRO and is the approving authority for all implementation decisions and major ITRO actions. The board consists of the incumbents of the positions shown below. In general, and subject to Service policies, the EB member delegates decision authority to the Deputy Executive Board member for ITRO implementations, and policy and procedural changes. EB decisions will be documented in Executive Orders, and distributed by the Secretariat in the memorandum format described in Figure 4-4.

Army - Commanding General, U.S. Army Training and Doctrine Command (TRADOC).

Navy - Chief of Naval Education and Training (CNET).

Marine Corps - Commanding General, Training and Education Command (TECOM).

Air Force - Commander, Air Education and Training Command (AETC).

Coast Guard - (Chief, Office of Training and Performance Consulting), U.S. Coast Guard

Health Care - ITRO Advisor for Health Care.

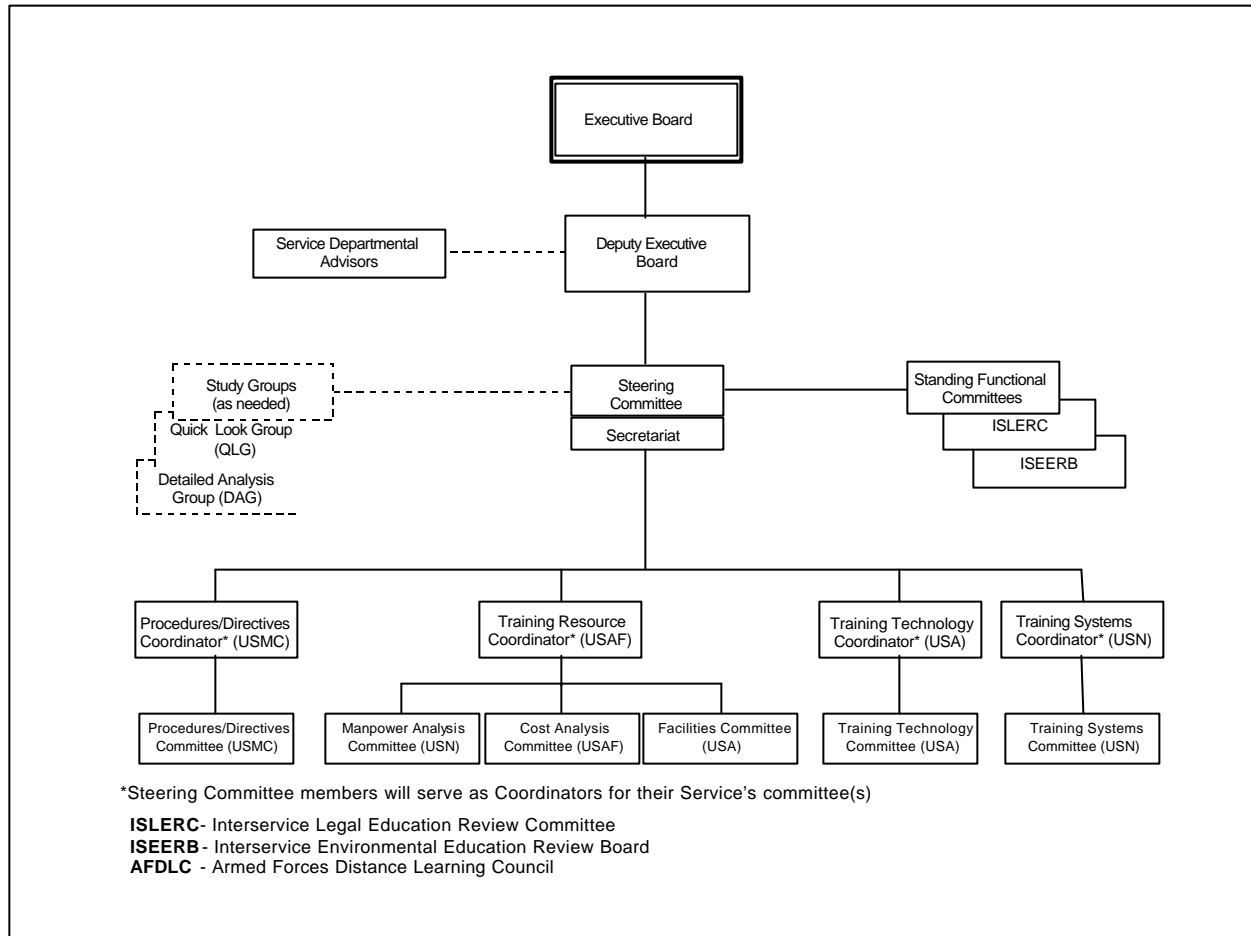
3. **Deputy Executive Board (DEB).** The DEB consists of a principal deputy (general/flag officer or civilian equivalent) to the EB member and is the body through which most ITRO actions, policies, and procedural changes are approved. The DEB notifies the EB of all policy and implementation decisions. The DEB concurrent with initial approval of the QLG approves DAG charters. Finally, the DEB will approve an option for implementation or terminate the study. DEB decisions will be documented in Interservice Executive Orders, and distributed by the Secretariat in the memorandum format described in Figure 4-4.

4. **Steering Committee (SC).** The SC will coordinate the day-to-day activities of ITRO and is comprised of one member from each Service and the Director, HC ITO. Steering Committee members will normally be at the O-6 level or civilian equivalent. Subject to service policy, Steering Committee members may approve ITRO actions in the name of their respective DEB member. Steering Committee decisions are documented in the Steering Committee meeting minutes. Each member is responsible for conducting the functions listed below for his/her own Service. The Steering Committee will forward any actions requiring DEB approval or consideration.

- a. Assist the DEB/EB in carrying out functions of ITRO.
- b. Provide recommendations to the DEB/EB for initiation of new studies. Action items will NOT be forwarded to the DEB until the Steering Committee has reviewed them and reached consensus.
- c. Coordinate ITRO matters in general, and serve as their Service's Major Committee Coordinator.
- d. Notify Service offices of studies and ensure names of study participants are provided.
- e. Advise and coordinate with each QLG/DAG Service representative. Monitor progress of studies.
- f. Distribute QLG/DAG and other reports to appropriate Service offices.
- g. Maintain ITRO records for their respective Service.
- h. Serve as Service Point of Contact for Interservice Training issues.
- i. Serve as Chairman of the Steering Committee during Secretariat year.

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Figure 2-1, ITRO Organizational Chart



5. Secretariat. The Secretariat serves as the central point of contact for all ITRO matters. Secretariat responsibilities are rotated yearly among the participating services. The Secretariat Service chairs the EB, the DEB, and the Steering Committee. Secretariat duties pass in the following order: USA, USMC, USN, and USAF. Specific responsibilities include:

- a. Scheduling and hosting EB, DEB and Steering Committee meetings.
- b. Coordinating Steering Committee activities.
- c. Publishing Interservice Executive Orders and Steering Committee meeting minutes.
- d. Preparing and releasing Staff Action Forms documenting initial requests for studies or reviews. .
- e. Disseminating Quick Look and DAG status and decision reports, Steering Committee and Board minutes, and other appropriate written material to Steering Committee/Board members.
- f. Coordinating and maintaining the ITRO Master Schedule, updated monthly.
- g. Serving as point of contact for external agencies and responding to outside requests. In this capacity, the Secretariat is responsible for coordinating the notification to Congress of ITRO implementation decisions.
- h. Preparing an annual report of ITRO activities.
- i. Maintaining the official ITRO files for the duration of its secretariat responsibilities (normally 1 January through 31 December of a given calendar year).
- j. The Health Care Interservice Training Office (HC ITO) serves as the Secretariat and lead facilitator for medical training. See Chapter 10 for additional details.

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6. Standing Functional Committees

a. Interservice Environmental Education Review Board (ISEERB). This committee was established to promote efficient, cost-effective, quality environmental education and training to the Services. The ISEERB acts as an advisory board to ITRO but is not a policy board, a resource board, or a board of directors. The objectives of ISEERB are to:

- (1) Promote efficiencies in meeting the environmental needs of the Services.
- (2) As subject matter experts, review education and training needs; evaluate common requirements, define course content, and recommend facilitating Service to address training to accomplish or meet the need.
- (3) Recommend appropriate environmental content to be embedded in ITRO training standards.
- (4) Review existing tools and courses and act as a clearinghouse.
- (5) Advise Deputy Undersecretary of Defense for Environmental Security and ITRO SC/DEB on policy.
- (6) Inform the DEB, EB and Defense Environmental Security Council's Education, Training, and Career Development Committee of progress.
- (7) Board members and committees follow Service or ISEERB protocols for informational requests.
- (8) Membership will include a Chairman (Air Force functional chief), Service representatives from each Service and Defense Logistics Agency (DLA), representatives from Service schools/organizations as designated by Service representatives, a representative from the ITRO Secretariat, and a representative of the Defense Environmental Security Council's Education, Training, and Career Development Committee.
- (9) The ISEERB will meet, at a minimum, on a semiannual basis.
- (10) Contract courses (including those offered by academic institutions) that were not developed to conform to Service specifications, occupational safety and health courses, environmental law for lawyers, and DOD Scholarship Programs are outside the authority of the ISEERB.
- (11) Provides input to the ITRO Annual Report.

b. Interservice Legal Education Review Committee (ISLERC). This committee was chartered under ITRO with membership consisting of the Commandant of the Judge Advocate General's (JAG) School of the U. S. Army, the Commandant of the Air Force JAG School, and the Commanding Officer of the Naval Justice School. The ISLERC meets twice annually to review legal training requirements and to ensure that the requirements are met efficiently. To accomplish its mission, the ISLERC:

- (1) Reviews the legal education and training requirements of the military services.
- (2) Examines education policies regarding interservice legal education and training to ensure that curriculum development activities are coordinated.
- (3) Analyzes the curricula of the three JAG schools.
- (4) Recommends changes to the curricula to improve legal education and training, avoid unnecessary duplication, and maximize joint cooperation, to include sharing of facilities and course materials where greater efficiencies can be realized.
- (5) Ensures new courses are not added to curricula of any of the three JAG schools until a determination is made that an existing course is unable to fulfill requirements.
- (6) Ensures, to the extent possible and practical, that the courses of the three JAG schools meet state licensing and continuing legal education requirements, and that appropriate credit is received.
- (7) Provides input to the ITRO Annual Report.

7. Specific Committee Functions

a. Committees are established for Procedures and Directives, Training Technology, Training Systems, and Manpower, Cost and Facilities Analysis. Each Steering Committee member coordinates the activities of their Service's committee or committees. Committees meet as required to accomplish actions directed by the EB, DEB, or Steering Committee.

b. Committees are authorized by the DEB and are composed of a minimum of one representative from each Service and Health Care. The coordinating Service as shown in Figure 2-1 will chair the committee. Each of the Steering Committee members is assigned as coordinator for a major committee under the cognizance of their respective Service.

c. Generic Functions of all committees include:

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- (1) Providing briefings as required to EB, DEB, Steering Committee, and higher authority.
- (2) Ensuring milestones and suspense dates established by higher authorities are met.
- (3) Ensuring minutes and reports of committee are provided to the Secretariat for staffing. At a minimum, the committees' annual report will include meeting dates accomplishments for the year, and planned activities for the following year.
- (4) Maintaining liaison with other committees.
- (5) Meeting as requested by the committee chairman.

8. Major Committees

a. The Procedures and Directives Committee. The Marine Corps Steering Committee member coordinates committee activities.

(1) Purpose. The Procedures/Directives Committee is responsible for coordination and preparation of all official ITRO procedures, regulations, and other documentation as directed.

(2) Functions

(a) Prepares interservice directives, regulations, and procedures for review and approval by the Steering Committee, DEB, and EB.

(b) Initiates changes to ITRO regulations or directives.

(c) Develops an up-to-date ITRO procedures manual, which reflects the current ITRO organization, and procedures for ITRO reviews.

(d) Oversees preparation of the Interservice Course List (ICL is prepared by the TRADOC representative).

(e) Oversees maintenance of the ITRO Directory (the MCCDC representative maintains ITRO Directory).

b. The Training Systems Committee. The Navy Steering Committee member coordinates committee activities.

(1) Purpose. The Training Systems committee is responsible for the development of recommendations and exchange of information related to the instructional systems development process and development of ITRO training methodologies.

(2) Functions

(a) Recommend policy and guidance for development and evaluation of ITRO training methodologies.

(b) Assist with resolution of training deficiencies

(c) Foster interoperability to ensure and enhance sharing and reuse of

(d) Provide for and foster the free transfer of education and training development information, knowledge, research findings and lessons learned.

(e) Assist with or initiate special studies as related to training systems

c. The Training Technology Committee. The Army Steering Committee member coordinates this committee.

(1) General. The Training Technology Committee is responsible for the development of recommendations and the exchange of information to promote mutual development and sharing of training innovations, technologies, material and support services, to include their applicability as training solutions for use by ITRO and the member Services.

(2) Functions

(a) Coordinates an exchange of training technology information and initiatives among the services.

(b) Minimizes duplication of effort and promote standardization and sharing of technology and equipment (including training aids, devices, and simulators) among services.

(c) Assess technical approaches with broad training applications and make recommendations.

(d) Identify issues, problems, and opportunities related to training technology and its implementation and make recommendations for interservice solutions to improve existing and future training technology, material, equipment and support services.

(e) Assess selected DOD and Joint training technology initiatives from the perspective of component services and/or ITRO TTC and make recommendations

d. Training Resources Coordinator. The Air Force Steering Committee member coordinates the activities of the Cost Analysis, Manpower Analysis, and Facilities Analysis Committees.

(1) Cost Analysis Committee. (Air Force Chairman)

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(a) General. The Cost Analysis committee is responsible for determining and evaluating in detail the program incremental/decremental cost impacts of all consolidation/collocation proposals.

(b) Functions

1 Develops and applies ITRO standardized costing methodologies to all consolidation/collocation proposals.

2 Identifies incremental/decremental resources and actions necessary to convert to interservice programs.

3 Determines corresponding costs/savings estimates for all consolidation/collocation proposals.

4 Serves as central point of contact for all cost inquiries regarding ITRO projects.

5 Maintains close liaison with the facilities analysis, manpower analysis, and other committees.

6 Serves as office of record for all cost analysis reports.

7 Provides updates to applicable portions of the ITRO Procedures Manual and maintains the ITRO Cost [analysis] Model.

8 Prepares the support sheets for budget transfers and coordinates the Budget Based Transfer effort.

(2) Manpower Analysis Committee (Navy Chairman)

(a) Purpose. The Manpower Analysis committee is responsible for determining and evaluating, in detail, the program incremental/decremental personnel requirements associated with any consolidation/collocation proposal.

(b) Functions

1 Identifies and determines total and all incremental/decremental manpower requirements necessary for ITRO studies.

2 Develops and applies standardized manpower models/procedures for manpower calculations.

3 Identifies incremental/decremental personnel requirements based on functional area manpower requirement.

4 Serves as focal point for all interservice training manpower negotiations.

5 Maintains close liaison with the cost analysis and facilities committees.

6 Updates and maintains the Manpower Appendix to the ITRO Procedures Manual.

(3) Facility Analysis Committee (Army Chairman)

(a) Purpose. The committee provides guidance to personnel involved in preparing the facilities input data needed to determine adequacy of training and support facilities for ITRO initiatives, provides orientation material for new committee members, and provides standardized methods for comparing alternatives. The Facilities committee is responsible for validating facility requirements and associated costs and for environmental documentation for proposed consolidations/collocations among the military Services.

(b) Functions

1 Plans and develops standardized facility cost procedures.

2 Investigates use of existing facilities for consolidated/collocated courses.

3 Plans and develops additional facility requirements prior to consolidation/collocation. Identifies outside influences or constraints that may affect consolidation/collocation.

4 Identifies incremental/decremental costs, including cost avoidances, and/or savings as a result of consolidation/collocations.

5 Ensures required environmental reviews are accomplished for consolidation/collocation actions.

6 Coordinates directly with the Manpower and Cost Analysis Committees.

7 Updates and maintains the Facilities Appendix to ITRO Procedures Manual.

8 Address accessibility requirement's IAW Rehabilitation Act of 1973, as amended, The Architectural Barriers Act of 1968, as amended, and the Uniform Federal Accessibility Standards.

9. **Facilitating Service**. Each directed study will be assigned to a specific Service (Army, Navy, Marine Corps, Coast Guard, or Air Force) for the purpose of facilitating the study or review process. The Steering Committee selects the facilitating Service. The specific office responsible for facilitating a study is the ITRO office of the selected Service. The HC ITO is the primary facilitator for HC studies. The facilitating Service will:

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- a. Appoint a study chairperson and determine the facilitating Service's representation on the QLG. The facilitating Service is encouraged to provide a pre-brief to the study Chairman.
- b. Contact each Service ITRO office to obtain the names, organizations, and phone numbers of the representatives who will participate in the study.
- c. Provide advice and counsel to the chairperson of the study. Using the ITRO Procedures Manual, Regulation, and appropriate briefings, ensures the chairperson understands ITRO goals, procedures, and participant responsibilities.
- d. Provide arrangements for support as required by the chairperson to conduct the QLG meeting.
- e. Present the ITRO orientation briefing at the QLG initial meeting. This briefing should include, at a minimum, ITRO manpower, facilities and cost analysis overviews.
- f. Ensure the chairperson makes appropriate distribution of the QLG minutes.
- g. Provide an ITRO facilitator to the study/review meetings. The facilitator should be well versed in ITRO procedures and study methodologies. If the facilitating office cannot support a meeting, it should obtain support through the Secretariat from the other ITRO offices. Participating Services are not required to provide a facilitator.
- h. Confirm analyst availability with committee chairpersons. .
- i. Ensure individual study schedules are coordinated with the ITRO Master Schedule maintained by the Secretariat.
- j. Upon selection of what appears to be the best option(s) by the DEB, coordinate final refined cost analysis of recommended option(s).
- k. Host the costing meeting at the training site chosen by the DAG.
- l. Prepare briefing charts detailing manpower and cost impacts for presentation to the SC, DEB or EB, as required.
- m. Issue letters/certificates of appreciation. The facilitating Service will forward letters requiring a secretariat-level signature. Such letters will only be for an individual who has accomplished extraordinary tasks in conduct of the DAG.
- n. Ensure all Services provide instructional systems specialist expertise for all phases of a study or curriculum review.

10. **Quick Look Group (QLG).** The purpose of the QLG is to determine if a functional training area should undergo a detailed analysis for the purpose of consolidating or collocating training. See Chapter 3, paragraph 4 for detailed QLG procedures.

11. **Detailed Analysis Group (DAG).** The purpose of the DAG is to conduct a detailed curriculum and resource requirements analysis with the goal of consolidating/collocating training. Permanent members are the Chairman and official Service voting members of the QLG; augmented as necessary by subject matter experts (SME) such as manpower, facilities, cost, budget, training, education, and instructional systems specialists. Service ITRO representatives present at DAG meetings are not members of the QLG/DAG but act as facilitators to the DAG to ensure ITRO procedures are followed. The DAG:

- a. Identifies common task/skills requirements and level of commonality that exists between each of the participating services.
- b. Builds course model(s) to include Service unique tracks.
- c. Identifies program and course curricula impacted by course model(s).
- d. Each Service representative gathers and analyzes data regarding consolidated training programs by completing the cost analysis data requirements worksheet in Chapter 9, and the facilities requirements computation worksheets in Chapter 8.
- e. Determines resource requirements.
- f. Considers Mobilization/surge requirements.
- g. Identifies site options, considers distance learning applicability and outsourcing/privatization feasibility.
- h. Each Service representative provides completed manpower and facilities worksheets and Cost Analysis Requirements Data Form to appropriate analyst's one week prior to costing DAG.
- i. Conducts preliminary/refined cost analysis and identifies the projected costs (decision making quality) to conduct training for each site option.
- j. Maintains close liaison with the ITRO staff.
- k. Reports status and findings. Ensures Secretariat receives original copy and makes distribution to Service ITRO offices.

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- l. Develop MOA and draft ISA (if necessary) for recommended option prior to EB approval of a proposed interservice training consolidation/collocation.
- m. Considers accreditation requirements.

12. QLG/DAG Chairman

- a. Serves as POC for all actions involving the DAG.
- b. Coordinates administrative support.
- c. Ensures recording and distribution of meeting minutes.
- d. Verifies that data collection is complete using standard data forms.
- e. DAG Chairman serves as the tiebreaker when needed, but at all other times remain the impartial, non-parochial mediator of DAG activities.
- f. Whenever possible a DAG Chair should be assigned to no more than one DAG at a time.

13. Service Voting Member

- a. Ensures appropriate subject matter experts are available as required.
- b. Ensures required data is available for QLG meeting and cost analysis.
- c. Presents official Service position.
- d. Assists Chairman in recording minutes/preparing reports.

14. Subject Matter Expert (SME)

- a. Reviews and compares Services' skills requirements
- b. Identifies training requirements.
- c. Identifies resource requirements (manpower, equipment, facilities).
- d. Completes required documentation; i.e., the ITRO forms located in Appendix B.
- e. Advises Service representative.
- f. Follows actual step-by-step study procedures for QLGs and DAGs as detailed in Chapter 3.

15. ITRO Support Staff POCs

ARMY:	Headquarters, TRADOC ATTN: (ATTG-ITRO) Building T-182 Ft Monroe, VA 23651-5000 Phone DSN 680-5643/COMM 757-728-5643/FAX-5690
NAVY:	Chief of Naval Education and Training CNET/ETE4 250 Dallas Street NAS Pensacola, FL 32508-5220 Phone DSN 922-84914038/COMM 850904-452-84914038/FAX-4894
MARINE CORPS:	Commanding General, Training Command, MCCDC (C474) 2042 South Street Quantico, VA 22134-5027 Phone DSN 278-3069/COMM 703-640-3069/FAX-4070
AIR FORCE:	Headquarters, Air Education and Training Command HQ AETC/DOJ 1 F Street, Suite 2 Randolph AFB, TX 78150-4325 Phone DSN 487-6363/COMM 210-652-6363/FAX-3614
HEALTH CARE:	Health Care Interservice Training Office 2300 E Street N.W. Building 2, Room 2117 Washington D.C. 20372-5120 Phone DSN 762-3814/Comm (202) 762-3814/FAX - 3845

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Chapter 3

ITRO STUDY PROCESS

1. **Scope.** This chapter is primarily for newly assigned Quick Look and Detailed Analysis Group (DAG) personnel, who have not had previous or recent ITRO study experience. This chapter details, in sequence, the individual action items required of the Quick Look and Detailed Analysis Groups from study initiation through the approval by the Deputy Executive Board. Forms and associated instructions used to document QLG/DAG actions are provided in Appendix B.

2. **Process Overview.** Chapter Two explains the duties of the ITRO Secretariat, Facilitating Service, QLGs, DAGs, and individual members of those groups, and should be reviewed by all involved in the ITRO study process. Figure 3-1 provides a simple, illustrated summary of the ITRO study process. The remaining paragraphs in this chapter explain, in detail, the full requirements of the QLG and DAG for each of those steps.

3. **Study Initiation.** The Interservice Training Regulation outlines the reasons for initiating an ITRO study. Regardless of the reason for initiation, all non HC ITRO study proposals will be presented to the Steering Committee. The Steering Committee will select and prioritize for study, those training areas with potential for consolidation/collocation. The HC ITO will process all Health Care study proposals as described in Chapter 10.

4. **Quick Look (QL).** The purpose of the QL is to determine if a functional training area should undergo a detailed analysis for the purpose of consolidating or collocating training. When the DEB selects a functional area for study it will designate a Facilitating Service to assist in the conduct of the study, and charter a Quick Look Group (QLG). Charter instructions are contained in Appendix A. Note: The Quick Look Charter will be contained in the message announcing the Quick Look meeting. Inasmuch as the purpose of the QLG is to determine whether or not to proceed into detailed analysis, it is permissible to complete the QL without an actual face-to-face meeting. The Facilitating Service/HC ITO may conduct video-teleconference (VTC) prior to or in lieu of an on-site QLG meeting.

a. When a QLG meeting is necessary, the Facilitating Service/HC ITO will:

- (1) Appoint and brief QLG Chairman. The Chairman cannot also serve as the Service voting member.
- (2) Notify the participating Services, announce dates, times, place, and tentative agenda for QLG meeting, and solicit names of other Service representatives. .
- (3) Ensure QLG members receive copies of this manual.
- (4) Provide an ITRO representative/facilitator for the QLG meeting who will coordinate all study meetings with the Secretariat.
- (5) Provide initial briefing on the ITRO process to the Quick Look Group (QLG).

b. Each Service will designate one individual as the Service voting member and limit SME attendance to essential personnel. The limitations of Title 10, U. S. C., notwithstanding, certain other DOD, Joint, or Federal agencies/organizations may also participate in a study. In general, however, the participating Service representatives will make training recommendations. It is imperative that members of the QLG be cognizant of their Services' training skill requirements and empowered to make reasonable decisions for their Service. The QLG will address a macro view of tasks, supporting skills, and knowledge achieved for the designated functional training area and a macro view of resource requirements (manpower, equipment and facilities) necessary to consolidate or collocate training. Specific responsibilities are as follows:

(1) Review all Services' training skill requirements. Participating Services will exchange the information at the QL meeting required to identify training task/skills requirements. The information is obtained from the Army Training Task Lists, Navy Occupational Standards, Marine Corps Individual Training Standards, Air Force Specialty Training Standards, and Coast Guard Occupational Standards. Service representatives must complete ITRO Forms 1 and 2, within Appendix B, prior to the QL meeting. Form 1A will be completed at the QL meeting.

(2) Conduct macro analysis to determine feasibility of consolidation/collocation. The training task/skills requirements documents will be reviewed for commonality. ITRO Forms 1, 1A and 2 can be used for this macro level review.

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(3) Service representatives should consider current or planned accreditation requirements for courses under study. QLG's must be aware that programmatic accreditation, or lack thereof, by one or more Services, is not reason to terminate a study.

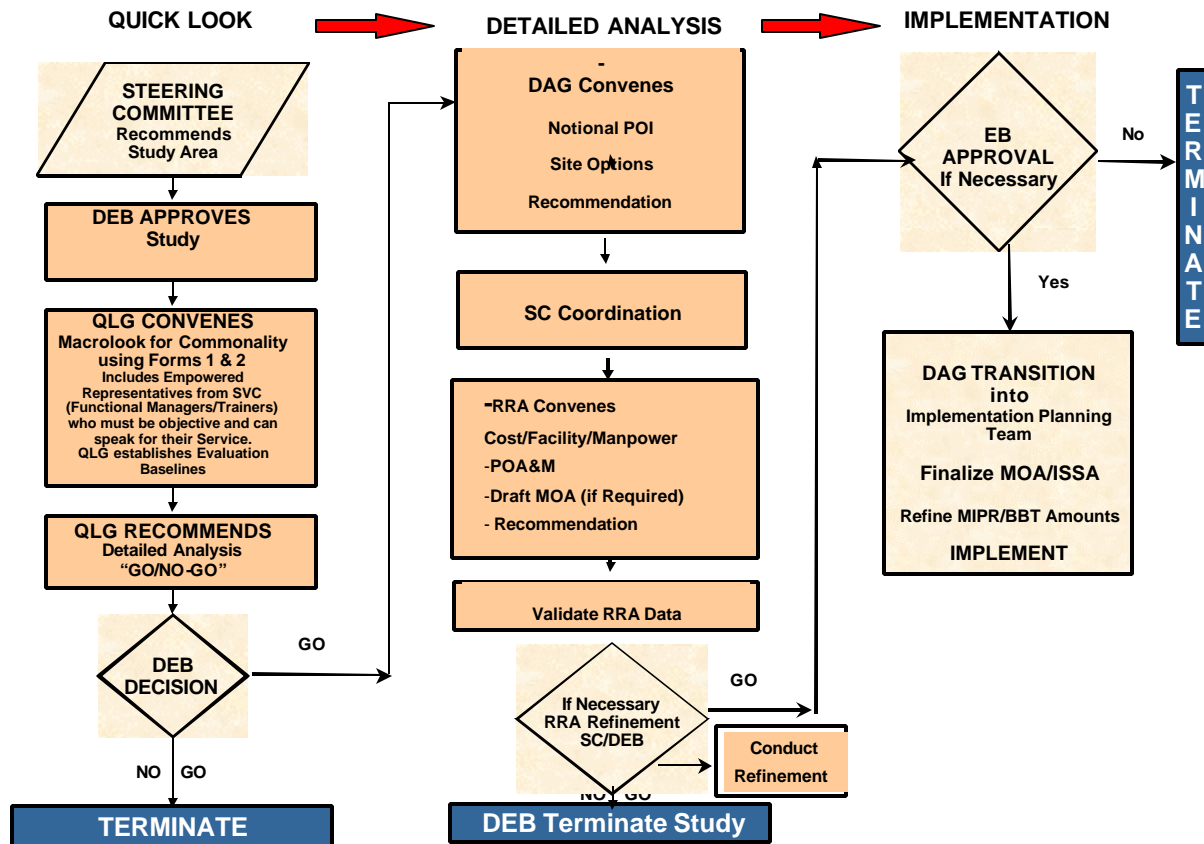


FIGURE 3-1, ITRO Study Process (Representational Only)

(4) Assess feasibility of single-site training. Single-site training is a goal of ITRO, not an ITRO requirement.

(5) Complete the Quick Look within the established time frame of three days if possible.

(6) The required outcome of the QLG is a recommendation to the SC as to whether or not the study should continue into detailed analysis or terminate—"GO" or "NO GO." The recommendation will be based on a simple determination of feasibility; feasibility that includes a rough estimate that there is or is not sufficient training commonality to warrant considering consolidated or collocated training. The QLG provides their recommendation in a status report containing all of the elements included in the format in Chapter 3. The report is provided to the Secretariat, who will staff to the Service ITRO offices for approval.

The QLG Report recommendation will be staffed by the Services. However, if a QLG recommends a "GO," the QLG will transition to a DAG without formal approval by the SC. Should the QLG propose a "NO GO" recommendation, DEB approval is required. The QLG Report will include justification supported by a clear audit trail and may require a briefing to the DEB by the QLG Chairman or to the DEB and EB, if an EB decision is required. A "NO GO" report should clearly document the degree of commonality of courses reviewed and the rationale for maintaining *status quo* rather than considering an interservice common core or collocation.

5. Detailed Analysis. The primary effort of the DAG is to conduct a detailed analysis of a specified area of training. The primary goal is a recommendation to the DEB/DMRTEC for the consolidation and/or

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collocation of training. The target date for completion of the DAG is 6 months from completion of the QLG. The DAG will determine the number, length and location of meetings. Additional work will be required between meetings to collect and assemble the necessary information for all steps of the DAG process.

a. Scheduling. The Lead Facilitator and DAG Chairman will coordinate, schedule, and announce the first DAG meeting. The Facilitator will coordinate study dates with the Secretariat for publication on the ITRO study calendar. Subsequent DAG meetings are scheduled as required with a sufficient break in between to allow for staffing of the various DAG reports. The site for the DAG meeting(s) ideally should be at a site(s) where the training being studied is currently conducted. Participants should include the original QLG members and necessary additional SMEs and resource analysts (manpower, facilities, cost) who may be required to complete the tasks outlined below. The goals of the DAG meeting(s) are to:

- (1) Phase I
 - (a) Develop notional Programs of Instruction (POI)/course model.
 - (b) Identify potential sites for consolidated/collocated training.
 - (c) Identify consolidation/collocation options.
- (2) Phase II
 - (a) Conduct resource requirements analysis of all site options.
 - (b) Conduct further resource requirements analysis on the preferred option, as necessary.
 - (c) Draft/revise the required Memorandum of Agreement.
 - (d) Develop proposed Plan of Action and Milestones (POA&M).

b. Interim Reports. The DAG Chairman and Lead Facilitator will ensure a report is prepared and distributed at the conclusion of each meeting. The format of DAG reports is discussed in detail in Chapter 4. The Lead Facilitator sends the original reports to the ITRO Secretariat for staffing and ensures copies are provided to each participating Service. Each Service's ITRO office is responsible for internal Service distribution.

c. Notional Program of Instruction (POI). POI is a document which describes a formal course of instruction in terms of structure, delivery methods, media, length, intended learning outcomes and evaluation procedures. The DAG initially refines the common task/skills requirements and level of commonality that exists between each of the participating services (Forms 1 and 1A). This is a continuation of what was done during the "commonality determination" phase of the Quick Look, but in detail sufficient to begin building a consolidated POI. These common requirements are the basis for development of a notional consolidated POI or course model(s). It also identifies those tasks/skills that are unique to each Service. Additionally, the listing serves as a reference document for resource analysis. With the refined task/skills requirements and the existing Service POIs in hand, the DAG builds a notional consolidated POI, to include Service unique tracks. The level of detail in the notional POI is left to the discretion of the DAG Chairman, and in certain instances; a simple course model(s) may suffice. The notional POI, however, is the DAGs equivalent of an operation plan and will ultimately be utilized by the Services to determine the instructional soundness of the DAGs plan for implementation. Therefore, during POI development, consideration will be given to each Service's training methodology, course structure, and type and quantity of training equipment. Where Service differences exist, empowered Service members should seek creative approaches to common methodology, equipment, etc., without compromising training quality or requirements. Typically schoolhouse personnel with experience in course development will jointly develop the notional POI which satisfies consolidated core requirements for two or more Services and Service unique requirements as specified in the requirements listing. The DAG must also ensure all programs and course curricula impacted by the notional POIs are considered. (At the later Resource Requirements Analysis phase, the notional POI must be in sufficient detail to be able to accurately complete the Manpower, Facilities and Cost Analysis checklists (ITRO Forms 3-7) in Appendix B.

d. Accreditation. Service representatives should consider impact of consolidation/collocation on current or planned accredited programs. Chapter 10, ITRO Health Care Studies, contains additional considerations for accredited courses.

e. Site Selection

(1) With most ITRO studies, one or more of the participating Services will already be conducting training related to that study. In general, the DAG should consider those existing training sites. The

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DAG should not, however, limit itself to existing training sites. Distance learning and the training sites of other Services, DOD, or other Federal Agencies should also be considered.

(2) The goal of ITRO is to reduce DOD infrastructure and to consolidate all similar training at a single site. On occasion this is not possible for various reasons. In general, however, DAGs should not concern themselves with potential or perceived showstoppers such as new facility or equipment requirements, or the cost of relocating staff or transporting students. These items will be factored into the resource requirements analysis, and it will be the DEB that will actually decide whether or not an option is cost-prohibitive. DAGs analyze and make factual, common sense recommendations to the SC/DEB—they **do not make decisions** for the DEB.

(3) In selecting site options, the DAG must consider the size of the training effort. An accurate estimate of the required average [daily] on board (AOB) strength of instructors, staff and students will allow equally accurate estimates of facility (permanent party housing, student billeting, and messing facilities) requirements. The notional POI, with the average daily student load (ADSL), will similarly allow accurate estimates of classroom requirements. Special classroom requirements, and special facility requirements, because of equipment, should also be evident from the POI. An environmental impact assessment is routinely conducted before any implementation begins. If environmental limitations are known in advance, however, the DAG is obliged to take these into consideration.

f. Training Options. Once all of the potential sites have been identified, it is necessary to fully articulate each option. Ideally, options will read: "Option # X - All Services consolidated at blank-site." At times, it may be necessary to limit the options to specific Services (e.g., "Option # X - Army, Navy, and Marine Corps consolidated at blank-site"), or to break up the existing training track (e.g., "Option # X - All Services conduct consolidated entry level training at blank-site, Army follow-on training at blank-site, Navy. . ."). There is no restriction on how to list an option, except that *status quo* is not usually an option. Rather, status quo is the baseline from which analysts determine incremental/decremental costs. Also, the number of options considered for resource requirements costing should not exceed what can be reasonably costed during the weeklong costing meeting.

g. Resource Requirements Analysis (RRA). Before a decision can be made to consolidate or collocate training, one-time and annual recurring costs must be identified. The Services document a Service-specific baseline that reflects the training establishment, as it will exist in the year of implementation as if ITRO never existed. This training establishment becomes the baseline against which all increases or decreases are identified related to the proposed consolidation/collocation. The additional costs or savings are those incremental (increased) or decremental (decreased) costs identified when comparing the new consolidated/collocated course requirements with the training baseline. Therefore, it is very important to identify, categorize, and include all relevant costs in the RRA. NOTE: Costs associated with course changes that would accrue regardless of ITRO will not be included in this incremental and decremental costing. To accurately align funding responsibilities, Service unique tracks of consolidated courses will be costed as collocated training. At the RRA meeting (generally a week in length), DAG members, Service Subject Matter Experts (SMEs), and Service analysts (facility, manpower and cost), come together and conduct a RRA of each of the options, based on the data compiled and recorded on the manpower, facility and cost questionnaires. Accurate and complete data is essential for this effort. Chapters 7, 8, and 9 provide instructions to the resource analysts on how to complete the required analysis and documentation. Manpower, facility and cost analysis is the responsibility of the DAG. Members are, however, assisted by their respective Service's Manpower, Facility and Cost Analysts, whose actions are guided by the appropriate ITRO committee coordinator. The Facilitator is responsible for coordinating the availability of each of the Service representatives at the RRA meeting. Service representatives—DAG members—will ensure the availability of appropriate SMEs. SMEs may include facility, equipment, manpower, and instructional experts, resource managers, or any other person necessary to develop a complete analysis. Please note, in the interest of minimizing expenses, it is not always necessary to have these experts at the meeting. Their availability by telephone, fax or email may be sufficient.

(1) Step 1, DAG Members and SMEs Prepare for RRA. With notional POI development and site option selection complete, DAG members must now determine the resource requirements for each option. Resource requirements must be defined and costs or savings associated with consolidation/collocation determined. Three major categories of resource requirements need to be estimated—manpower, facilities and equipment. They are then combined and summarized in a RRA Report, in which a recommendation for a specific option is made to the DEB, or, a NO GO is

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recommended if none of the options are feasible. In preparation for the preliminary cost analysis meeting, Service representatives are responsible for ensuring the required data are collected and provided to the manpower, facilities and cost analysts, who become part of the DAG at this point. The resource worksheets described in the following sub-paragraphs should be completed and provided to the respective Service analysts two weeks prior to the meeting. NOTE: Resource data changes made during the Resource Analysis Requirements session may lead to incomplete or invalid outcomes.

(a) Manpower Analysis. The first worksheet that must be completed is ITRO Form 3, Manpower Requirements Checklist. Using the notional POI or course model and student throughput information, Host Service SMEs will complete one checklist for each course and each option. Service Manpower Analysis Committee members will provide assistance in completing these worksheets. From the data provided in these checklists, the manpower analysts, using the Manpower Analysis Procedures and Guidelines in Chapter 7, will compute permanent party requirements (instructors, overhead and detachment personnel) and average daily student load (ADSL). The Manpower Analysis Committee will prepare a report and present it to the Facilities Analysis Committee and the Cost Analysis Committee so space and money requirements can be determined. Surge requirements that affect manpower will be considered on a case-by-case basis.

(b) Facilities Analysis. Service SMEs will complete the ITRO Facility Worksheets (ITRO Forms 4, 5, and 6) in accordance with the "Facilities Analysis Guidance" sheet. The facilities analysts will use these worksheets, the Facilities Guidelines in Chapter 8, the manpower requirements, and numerous interviews with training and host facility SMEs to determine what facilities are available for training, billeting, dining and morale, welfare, and recreation (MWR) support. If adequate facilities are not available, the Facilities Committee will determine the scope and cost of additional facilities and furnishings to support the proposed option. This would include the impact of **surge** on each option, **and the capability of the site to accommodate potential growth in the future**. This information is fed to the Cost Analysis Committee. Facility requirements and associated cost estimates for ITRO initiatives are dependent upon projected student loads and permanent party end-strengths. Areas of consideration include classrooms, labs, school administration, exterior training/equipment storage areas, messing, billeting, and family housing. When determining optimum site for consolidated or collocated training, the DAG will identify the available facilities, the facilities that require modification, or new facilities required in support of the developed course model. The ITRO staff and Facilitating Service will coordinate availability of facility personnel to assist in the calculation of facility requirement estimates through the Facilities Analysis Committee. Appendix C contains instructions for the facility analysis.

(c) Cost Analysis. Service SMEs will complete ITRO Form 7, Cost Analysis Data Requirements Form (commonly referred to as the 12 Question Form) for use by the Cost Analysis Committee. SMEs should contact their respective Service cost analyst if they require assistance in completing this form. In addition, SMEs will be required to provide detailed list(s) of equipment that must be procured/purchased, including quantity and cost. In some cases, equipment must be transferred to support a specific consolidation/collocation option. If this is the case, the DAG will identify types and quantity of training equipment and equipment maintenance programs required in support of the program of instruction. In order to calculate accurately all of the costs associated with a consolidation/collocation, data associated with the acquisition or transfer of equipment needs to be compiled. This data includes, but is not limited to: gross tonnage and cubic feet, and one-time unique costs, including packing and shipping, special handling, or calibration of specialized laboratory or industrial equipment. Costs can be determined through an installation's Transportation Management Office.

(2) Step 2, DAG Conduct RRA Meeting. The DAG composition will expand at this point. The RRA meeting will include not only the primary Service representatives to the DAG, but also members of the three resource analysis committees (manpower, facilities and cost) and appropriate SMEs (instructional systems specialists, functional experts, facilities managers, etc.).

(a) Manpower, facilities and cost analysts, with the assistance of the appropriate SMEs, will complete their analyses and document their results as per the individual report chapters: Cost Analysis, Chapter 9; Facilities Analysis, Chapter 8; Manpower Analysis, Chapter 7. The O&M summary will be part of the Cost Analysis Report, Chapter 9. Approval of the final report by the DEB constitutes approval of the O&M transfer amounts.

(b) The DAG will analyze the data presented by the resource analysis committees to determine the most cost effective option. However, the cost of each option is not the only consideration in making the final recommendation. DAG members must also consider the overall capability of each site options to meet the requirements of each Service's standards. Additional considerations might be

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capability to meet surge requirements, individual or collective quality of life, training environment, etc. There is no limit to the number and types of facilities and topics that can be reviewed.

(c) Based upon all factors, the DAG will develop specific recommendation(s) for DEB/DMRTEC approval. If the DAG recommends no consolidation/collocation take place (NO GO), detailed rationale for the recommendation must be developed. If the DAG recommends consolidation/collocation, they will prepare a draft Plan of Action & Milestones (POA&M) for implementation. The implementation POA&M should list all of the significant actions that must be accomplished to implement the recommended action. The DAG, with appropriate SMEs will also prepare a draft or revised Memorandum of Agreement (MOA), or the host will begin preparation of the MOA.

(d) The DAG will prepare a report of the RRA effort (see Chapter 3 for format) and present their recommendation(s) through the Secretariat to the DEB/DMRTEC. The DAG recommendation must provide the DEB/DMRTEC sufficient information and documentation to enable it to select an option for implementation. Service representatives may also add paragraphs explaining their own unique Service concerns. Service representatives will sign the report at the meeting and the facilitator will provide all Service representatives with a complete copy, either in hard copy or electronic file. At this point, the RRA report is a *draft* report until validation of the resource data is completed (see Step 3 below). A refinement costing may be necessary (Step 4 below) if data does not clearly identify a viable option or if requirements of the recommended option are not clearly defined. The facilitator will hold the report until he/she determines it is ready for final staffing.

(3) Step 3, Analysts Validate/Verify RRA Data. Service analysts have fifteen days from the date of RRA meeting completion to review RRA data in order to ensure data are accurate and to make corrections, if necessary. Analysts may recommend a refinement costing if data does not clearly define resource requirements of the best option. The chairmen of the manpower, facilities and cost analysis committees will either notify the lead facilitator that no corrections are necessary or provide corrected copies of their respective RRA report appendices to the facilitator within the fifteen day window.

(4) Step 4, Lead Facilitator Review RRA Validation/Verification. Following analyst review of the RRA, the study facilitator will determine if the report is in sufficient detail to forward to the DEB/DMRTEC for approval. If changes to RRA data are not significant and appear to have no impact on the recommendations made by the DAG, the facilitator will update the report cover page and narrative minutes (if necessary), replace any updated appendices and submit the final report to the Secretariat for staffing. Discussion between the facilitator and DAG chairman may be necessary to fine tune the report and determine if refinement costing or an additional DAG meeting is required prior to submitting the report to the DEB/DMRTEC for approval.

(5) Step 5, Conduct RRA Refinement. A refinement RRA may require a partial or complete RRA, as described in Step 1 above, in which case, the DAG will repeat steps 1-4. Attendees should include many of the same individuals who participated in the first RRA effort. However, an effort should be made to streamline this RRA refinement by including only those individuals required to achieve a comprehensive report and a clear recommendation for the DEB/DRMTEC. In convening this RRA, the meeting should be held at the primary option site. This is especially important if the DAG has not previously met at this site. The DAG must ensure that all resource data are converted from estimates to accurate and complete information. This RRA data will ultimately become the basis for budget execution/resource allocation during implementation if the DEB approves an interservice option.

h. The facilitator will submit the final, validated report to the ITRO Secretariat within five working days after Service analyst validation. The DEB/DMRTEC will either approve or disapprove the DAG recommendation, and indicate their concurrence/non-concurrence with the O&M Summary attachment. If disapproved, further guidance will be provided to the DAG via the Facilitating Service. The DEB/DMRTEC will direct the DAG in cases where the consolidation will involve outsourcing, or in instances where there are important MOA, ISA, or funding issues requiring resolution.

i. Revisions to the Final Report. If during the report staffing process, the need develops to change or revise the report due to changing conditions or new information which affects study parameters, resource availability, or cost factors, the following procedures will be used:

(1) If any factors bearing on the DAGs report or recommendations change, notify the appropriate Service ITRO Steering Committee member.

(2) The appropriate Service ITRO Steering Committee member will notify the DAG Chairperson and Secretariat, in writing, of the need to change/revise a report and send information copies to the other Services' Steering Committee members. Complete rationale for the requested change will be included.

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(3) The Lead Facilitator, with the SC and DAG Chairperson's concurrence, will either reconvene the DAG, reconvene a portion of the DAG, or advise the appropriate agency, office, or committee(s) to revise the report. Any instructions to change a portion of the DAGs report will be in writing with information copies provided each Service's Steering Committee member.

(4) The agency, office, or committee making the required changes will forward the revised information, with a cover letter identifying the reasons for the changes, to the Secretariat with information copies to the DAG Chairperson and all services' Steering Committee members.

(5) The Secretariat will introduce the revised material into the continuing process and the Service ITRO offices will make distribution within their respective Services.

(6) Revised reports will be staffed and validated in the same manner as the original report.

(7) Approval. Implementation of a study cannot begin without DEB approval. This will be accomplished either through the staffing process, or by voice vote at a formal DEB meeting.

6. Implementation Procedures. The implementation group during the initial phase of implementation consists of the DAG members. DAG members, however, may be replaced or augmented by implementation experts, subject to Service policy and direction. During implementation, Services may require the participation of additional personnel (SMEs, implementation experts, host and participating installation coordinators, etc.), or may defer certain actions to a Service element outside of the ITRO organization. From the onset, however, individuals responsible for the creation and staffing of the MOA and resource managers responsible for the ISA will be active participants. Finally, the chairman may turn over implementation responsibilities to implementation experts from the host and participating Services upon approval of the DEB. No resources should be transferred without an approved MOA.

a. Implementation Meetings will be scheduled as often as necessary. Authority to call an implementation meeting rests with the DAG Chairman, host installation or participating Service as appropriate and necessary. The Facilitating Service will coordinate and assist with implementation meetings. At the conclusion of each implementation meeting, a report, in the format similar to that in Figure 4-2 will be prepared and submitted to the ITRO Secretariat.

b. If not already complete, the DAG must immediately complete whatever action is necessary to enable finalizing and approval of the Memorandum of Agreement (MOA) and Interservice Support Agreement (ISA). See Appendix D for a sample MOA.

c. It is impossible to list all possible actions that may be required in order to affect implementation. The following is a list of possible actions, areas or items that should at least be considered or investigated by the DAG, and other information that may be appropriate for inclusion in the Implementation Plan and Milestone Chart. Items are listed in probable order of importance.

?? Environmental Assessment. This is a requirement of the host installation, but personnel and equipment movement cannot commence until it is accomplished.

?? Equipment Review. Ensure all requirements have been addressed, transfers have been arranged and funded, modifications made, maintenance arranged, and purchases have been programmed. Verification of the condition of the equipment, and coordinate the movement plan may be necessary.

?? Facility Site Surveys. This should have occurred incident to the final cost analysis. Schedule additional surveys as necessary.

?? Facility Construction/Modification Schedules. These should be reviewed and included in the milestone chart.

?? Manpower Computations. These are used for final cost analysis, need to be verified continuously, and generally should not change.

?? Manpower and Organization Actions. These include all required manpower actions on the milestone chart.

?? Final MOAs and ISAs. If required, they are the responsibility of the host installation, but are coordinated by the DAG. MOAs are signed at the Training Command (TRADOC, CNET, MCCDC, and AETC) level. ISAs (if required) are signed IAW existing Service policy.

?? Student Arrival/Course Class Commencement. This should be coordinated by the DAG and documented in the milestone chart.

?? Instructor Certification

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?? Lesson Plans

?? Implementation Meetings. These should be planned and listed on the milestone chart. A recommended format for an Implementation Meeting Report is contained in Figure 3-2.

?? Contractor Support/Contractor Logistics Support.

?? Financial Considerations. Consider in addition to, or in support of the ISA, budget base transfer, etc.

?? Collocated Courses. Ensure all Service-unique requirements have been met by the host installation.

7. **Responsibility.** Responsibility for implementation actions differs from Service to Service. Figure 3-1, Implementation Responsibility Matrix is provided below to assist implementers.

IMPLEMENTATION RESPONSIBILITY MATRIX					
FUNCTION	USA	USN	USMC	USAF	HC
Organizational Planning	HQ TRADOC ATTG-ITRO	ETE4 3	MCCDC, (C467)	HQ AETC/XPP	HCITO/Schools
Program Manager	HQ TRADOC ATTG-ITRO	ETE4 3	MCCDC, (C467)	HQ AETC/DOO/D OF	HCITO/Schools
Facilities	HQ TRADOC ATBO-GPL	ETE4 3	MCCDC, (C467)	HQ AETC/CEP	HC Schools
Comptroller/Fund Requirements & Allocations	HQ TRADOC ATRM-B	ETE4 3	MCCDC, (C463FM)	HQ AETC/FMA	HC Schools
Manpower	HQ TRADOC ATRM-FT	ETE4 3	MCCDC, (C463M)	HQ AETC/XPM	HC Schools
Military Assignments	HQ TRADOC ATBO-BO	ETE4 3	MCCDC, (C463M)	HQ AETC/DPA	HC Schools
Civilian Assignments	HQ TRADOC ATBO-C	ETE4 3	MCCDC, (C463M)	HQ AETC/DPC	HC Schools
MOAs	HQ TRADOC ATTG-ITRO	ETE4 3	MCCDC, (C4673)	HQ AETC/DOZ	HC Schools/ITO
Equipment Resourcing	OCIE: ATBO-HMS CLASS VII: ATOM-P	ETE4 3	MCCDC, (C467)	2AF/LG	HCITO/Schools Support Office
Student Scheduling & Programming	HQ TRADOC ATOM-O ATOM-P	ETE4 3	MCCDC, (C463FT)	2AF/XP	HC Schools

FIGURE 3-2, Implementation Responsibility Matrix

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Chapter 4

ITRO DOCUMENTATION/ADMINISTRATIVE REQUIREMENTS

1. **Study/Review Implementation Meeting Report Format.** The lead facilitator and study/review group chairman will ensure a comprehensive report is completed at every meeting. The chairman and the designated representative of each participating Service will sign the report. Figure 4-1, outlines the minimum report requirements. The lead facilitator will submit the report original to the Secretariat within 5 workdays of completion of the meeting. Each Service representative will provide a copy directly to his/her respective ITRO office.

ITRO STUDY/REVIEW REPORT FORMAT

1. Purpose. Include Title & Course Numbers of each course studied. To determine if there is sufficient commonality between each participating Service (list the title of the training being studied; e.g., "Army and Marine Corps Combat Engineer Training) to warrant Detailed Analysis.
2. Background. (Paraphrase from the Charter, stating what training is being studied, who is participating, etc. It is not necessary to repeat everything on an attachment; simply refer to it.
3. Discussion. (Here detail what took place at the meeting and provide sufficient detail to support the recommendation that will appear at the end of the narrative. Again, do not repeat, just refer to the attachments.)
4. Service Issues/Concerns. This is the opportunity for a Service to articulate a Service unique position on recommendations or discussion items developed during the course of the study.
5. Recommendation. (Always start this with "The QLG/DAG recommends proceeding with, or not proceeding with, detailed analysis.")
6. Signature Page
7. Attachments: Will vary according to the documentation required for a specific meeting. Consists of but not limited to the following: List of attendees, Service briefs, appropriate ITRO Forms, Resource Analysis Committee Reports.

Figure 4-1, Report Format

2. **Quick Look Group (QLG) Documentation.** Following DEB/DMRTEC approval of a study, the QLG will meet to initiate the study process. The QLG will make one of two recommendations: (1) Transition to a Detailed Analysis Group (DAG). This is a "Go" scenario; (2) Recommend termination of the study. This is a "No Go" scenario.

a. Go Scenario. A "Go" recommendation will be considered to be approved by the DEB/DMRTEC unless the DAG has received contrary instructions from the Secretariat. The QLG will provide a report to the Secretariat stating that initial Quick Look analysis is complete and study is progressing to Detailed Analysis Group stage. The Secretariat will staff the report of Service coordination. The report will be in report format, signed by the QLG Chairman and Service representatives.

b. "No Go" Scenario. A "No Go" recommendation will require review and approval by the DEB. The report to the DEB will be signed by the QLG chairman and each Service representative and will consist of items 1a(1) through 1a(5) above. The narrative summary will detail the QLGs findings regarding commonality of training between the participating Services. Keep in mind that the determination of whether or not to proceed into a Detailed Analysis will be based on the degree of commonality of training between the participating Services. Such things as who will host or where the training will be conducted or how the consolidated curriculum will be designed, are not QLG concerns. The QLG findings will be followed by a detailed explanation of why the QLG does not recommend proceeding with detailed analysis. In the event there is not consensus, Service representatives are welcome to include separate Service remarks in the report.

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c. **QLG Reporting Requirements**

- (1) Cover Sheet similar to the cover of this manual, with the ITRO logo, study title, and the date(s) and location of the meeting.
- (2) Meeting minutes or narrative summary of meeting results with a specific recommendation to proceed with detailed analysis to terminate the study (GO or NO GO). Figure 4 is a suggested narrative format.
- (3) Documentation of initial request for study (memorandum, message, JCS tasking, etc.).
- (4) List of Attendees (Include name, grade, command, phone, fax, and email address)
- (5) ITRO Forms 1, 1A, and 2
- (6) Any briefing slides
- (7) Proposed DAG Meeting Schedule. A QLG may convert immediately to Phase I of the DAG, in which case, the QLG and DAG results will be documented in a single report. When combining the QLG and DAG, all documentation required for both meetings will be included in the report.

3. Detailed Analysis Group (DAG) Documentation

a. Status Reports/Meeting Minutes. . Phase I of the DAG may require one or more meetings. A report is required for each meeting. Summarize recent DAG activity. The Lead Facilitator will provide Service representatives with an electronic copy and the Secretariat with an electronic copy of report and the original signature sheet. Minutes will be in the basic *Purpose, Background, Discussion, and Recommendation* format, deleting or adding paragraphs as appropriate. One or more Service representative may prepare a statement expressing Service concerns/issues for inclusion in the Discussion section when consensus cannot be reached. Documentation will include:

- (1) Cover Page
- (2) Narrative Minutes
- (3) List of attendees
- (4) Any briefing slides
- (5) Visual illustration of the course structure (course model)
- (6) Notional POI
- (7) Additional documentation, as required

b. Resource Requirements Analysis (RRA) Report. The RRA report will be the basis for final decision to implement (consolidation, collocation, deconsolidation, or revision, as appropriate) or to terminate the study without further action. It will contain:

- (1) Cover page.
- (2) Narrative minutes. The Discussion section should contain enough information (detail) to support the Recommendation(s) made by the DAG...
- (3) List of attendees.
- (4) Proposed Implementation POA&M
- (5) Draft MOA and ISA (if required)
- (6) Chapter 9, Cost Analysis Report.
- (7) Chapter 8, Facilities Analysis Report
- (8) Chapter 7, Manpower Analysis Report
- (9) Additional documentation, as required
- (10) Refinement Resource Requirements Analysis Report. If required, a refinement RRA will be conducted. The report contains the same information as the RRA Report, with updated appendices reflecting the current resources requirements data.

4. **Implementation POA&M**. See Figure 4-2 for the proper format of an implementation plan.

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POA&M FORMAT
<p><u>Title:</u> (List the name of the study.)</p> <p><u>Authority:</u> (List the appropriate Executive Order.)</p> <p><u>Background:</u> (Describe the option selected.)</p> <p><u>Description of the Implementation:</u> (Details of equipment and personnel moves, student data, facility modification/MILCON, course convening dates, assumptions, etc.)</p> <p><u>Implementation Milestones:</u> (Refer to the <i>Implementation Actions</i> listing in the preceding Chapter.)</p> <p><u>Annex A:</u> Major Taskings</p> <p><u>Annex B:</u> Points of Contact (In addition to DAG members, list new participants and their specific area of responsibility.)</p> <p><u>Signatures.</u> All DAG members should sign implementation POA&M.</p>

Figure 4-2, POA&M Format

5. Implementation Meeting Reports. See Figure 4-3 for the proper format of an implementation meeting report.

Table of Contents
List of Attendees/Participants
Executive Summary
Signature Page
Major Milestones Summary
Purpose and Objectives of the Meeting
Assumptions, Comments, Issues and Concerns
Results
Recommendation (include host installation and participating Service recommended action items)
Appendices/Annexes/Attachments

Figure 4-3, Implementation Meeting Report Format

a. **ITRO Report Format and Internal Staffing Procedures** All reports and worksheet attachments will be generated using Microsoft Office software for standardization and facilitate the staffing process via email. The final cost analysis report, Chapter 9, will be distributed in Adobe format.

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b. The facilitator will construct the report by creating each component of the report (i.e., cover page, minutes, briefs, costing worksheets) as a separate file either on disk or laptop. The following file names are suggested for each component of the report to ensure proper order when the report is printed and constructed:

- (1) Cover Page – 01(Study name) Cover.doc
- (2) Minutes – 02(Study name) Minutes.doc
- (3) Briefs – 03. (Study name) briefArmy.doc, 04.Navy.doc
- (4) Worksheets – 05Cost.doc, 06Facilities.doc, 07Manpower.doc

c. At the conclusion of a meeting, the facilitator may provide a copy of a report to the attendees via hard copy, floppy disk or email.

d. For all reports except the RRA report, the facilitator will submit the signed, original report to the Secretariat within five working days after completion of the meeting.

e. For the RRA report, the facilitator will hold the *draft* report until the resource committees complete the validation/verification process (15 working days). The appropriate resource committee chairman will advise the facilitator if changes to the RRA data impact the DAG recommendations. The facilitator will contact the DAG Chairman to determine if additional discussion, meeting or RRA are required. The facilitator will update the draft report as necessary to produce a final report ready for staffing.

f. The facilitator will prepare a draft ITRO Staff Action Form (SAF), to exclude the Secretariat tracking number and the suspense date and submit to the Secretariat with the report. The SAF should include a specific request for action by the SC/DEB/EB/DMRTEC and a general description of the action required.

g. The Secretariat will assign a tracking number and a 30-day suspense, and distribute for Service staffing.

h. If one or more Service does not concur with or approve the requested action, the Secretariat will advise the facilitator who will coordinate with the DAG Chairman to determine corrective action for resolution.

i. DEB/DMRTEC and EB decisions will be returned to the Secretariat upon completion of Service staffing. The Secretariat will report results to the DEB and publish appropriate IEO for approved actions.

6. ITRO Record Keeping. During a Service's tenure as Secretariat, it will be responsible for maintaining official ITRO records. These permanent records remain with that Service even after Secretariat has passed to the next Service. Records include, but are not limited to: Original QLG and DAG reports; original EB, DEB, Steering Committee, and permanent committee meeting minutes; ITRO Staff Action Processing Forms generated during the calendar year; associated with the foregoing; and the annual report for that calendar year. HC ITO will maintain permanent records for Health Care.

7. ITRO Annual Report. No later than 1 April of each year the former Secretariat Service will publish an annual report of ITRO activity for the preceding calendar year. Organization of the Report will be in the format found in Figure 4-3 and include, as attachments, a list of all studies initiated, continued, or completed during the year. The report will be provided to each ITRO office in sufficient quantity to allow for internal Service distribution. If requested, the report may be provided to other government and DOD agencies and activities in accordance with the Secretariat's Service policies and procedures. Annual reports will be signed by the previous DEB Chairman (for the year covered by the report).

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ITRO ANNUAL REPORT	
Cover Page:	ITRO Heading, the words "Annual Report," the calendar year covered by the report, and the title of the command preparing the report.
Abstract:	Summarize the Year's activities for ITRO.
Studies:	List each study, continued or initiated by ITRO, followed by status or results.
Other Actions:	As appropriate.
Attachments:	Current ITRO Organization Chart ITRO Executive Orders Committee Reports

Figure 4-4, ITRO Annual Report

8. **ITRO Executive Orders.** The Secretariat will document key ITRO decisions in an Interservice Executive Order, to include decisions related to approval to consolidate, collocate, deconsolidate or withdraw, policy, procedures, and resources. Or reference to the minutes from an EB, DEB, or DMRTEC meeting where the decision was made.

9. **Meeting Minutes** (other than QLG or DAG meetings). At a minimum, minutes will be for all meetings of the EB, DEB, SC, and each permanent or standing committee. They will be prepared on plain paper with a header of INTERSERVICE TRAINING REVIEW ORGANIZATION followed below by the name of the group meeting (Executive Board, Deputy Executive Board, etc.), and ending below that with the place and date(s) of the meeting and the Executive Order number as described in paragraph 8 above. The member's names and titles will follow (other attendees can also be either listed or attached). The remainder of the document can be organized chronologically, topically, or a combination of the two, as desired. The minutes need not be verbatim, but must accurately present all discussions. If possible, the minutes should include copies of slides or other material presented at the meeting. The meeting chairman need only sign meeting minutes. The Secretariat is responsible for preparing the minutes and will allow each Service to review and edit prior to signing. In this regard, members will be allowed to insert, delete or otherwise correct material in the minutes, regardless of what actually transpired at the meeting, but within reason and in a manner that does not turn the minutes into a useless document.

UNITED STATES MARINE CORPS MARINE CORPS COMBAT DEVELOPMENT COMMAND QUANTICO, VIRGINIA 22134-5017	IEO-XXXX-XX Date
MEMORANDUM FOR THE INTERERSERVICE TRAINING REVIEW ORGANIZATION	
Subj: ITRO EXECUTIVE ORDER XXXX-XX - IMPLEMENTATION OF SERVICE TRAINING REVIEW ORGANIZATION XXXXXXXXX CONSOLIDATED TRAINING	
1. <u>Purpose.</u> 2. <u>Background.</u> 3. <u>Discussion.</u> 4. <u>Decision.</u>	
I.M. INCHARGE BGen, U.S. Marine Corps Chairman Deputy Executive Board	
ATTACHMENTS: TRADOC Concurrence CNET Concurrence MCCDC Concurrence	

Figure 4-5, Sample ITR

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Chapter 5

ITRO COURSE LIFE CYCLE PROCESSES AND PROCEDURES

1. **Background.** ITRO training is based on mission training requirements. Therefore, a mission based cyclical review of training is necessary to ensure the training meets mission requirements and the demands of increasingly complex technology, combat systems and training platforms. In addition, the need to maximize the efficiency of training by integrating current instructional technology design and technology, and providing integral learning resource centers must be a part of the curriculum review process.
2. **Goals.** The goals of the training review should include:
 - a. Host Service and/or school providing an overview of the school's mission and the variety of its training programs and how they relate to the ITRO course(s).
 - b. Host Service providing a description of the school's organizational structure in terms of who develops, who executes, and who evaluates the school's curriculum.
 - c. Providing the mission environment with appropriately trained personnel.
 - d. Eliminating redundant or non-essential training.
 - e. Incorporating "Just-In-Time" and "Core-and-Strand" concepts where and when appropriate.
 - f. Addressing Quality of Life and other student issues.
3. **Curriculum Review Policy.** Cyclical review of curriculum is essential. Internal curriculum reviews will be conducted in accordance with Host Service policy. Curriculum changes that impact resources or skills/training requirements must be formally staffed through the Host ITRO office to the Secretariat. Services will coordinate HC curriculum reviews through the HCITO. Services may request curriculum review at any time to address the following:
 - a. Review of most recent training task/skills requirements listings/surveys.
 - b. Training task analysis review results.
 - c. Impact of the course in its role of MOS/RATING/AFSC/NEC producing criteria.
 - d. Review/Update of applicable MOA(s).
 - e. Cost analysis to determine changes in resource requirements, if required by curriculum changes.
4. **Curriculum Review Board.**
 - a. A CRB is conducted when changes to consolidated curriculum impact resources or Service training standards and follows a condensed QLG/DAG process, as described in Chapter 3. The report will include any documentation generated in order to communicate the changes and appropriate rationale. An ITRO Curriculum Review Board (CRB) is comprised of course administrators, course instructors, subject matter experts (SMEs), instructional systems specialists, resource and program sponsors from each participating Service. Mission training requirements will be compared to current course curricula, and appropriate instructional revisions, deletions and or additions. An ITRO CRB is conducted as a condensed ITRO study process i.e. QLG, DAG, RRA as required. The CRB will:
 - (1) Use a systematic Instructional Systems Development (ISD)/Systems Approach to Training (SAT) approach to reviewing the curriculum.
 - (2) Conduct necessary curriculum comparisons. Consider similar training conducted on the "outside".
 - (3) Introduce external elements ("out-of-the-box" thinking) to determine if training could be conducted more efficiently and effectively in another type of learning environment.
 - (4) Provide a process for resource and program sponsors to identify and correct training deficiencies.
 - (5) Establish a vehicle for curriculum review authorities' participation in the resource programming decisions. In concert with service MACOM/MAJCOM resource managers, determine optimum curriculum adjustments at minimum costs; resource managers to provide resource impact of decision alternatives. Task host MACOM/MAJCOM Manpower Office to determine criteria required in ITRO formula for determination of instructors, e.g., Instructor Contact Hours, Optimum Class Size and Course Length in Weeks.
 - (6) Assess and assist in resolving the following:
 - (7) Technical accuracy of curricula.

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- (8) Documented mission training needs.
 - (9) Accuracy and compatibility of technical manuals and course data with respect to courses reviewed.
 - (10) Training safety issues.
 - (11) Satisfaction of mission training requirements.
 - (12) Review of feedback from student graduates and field commanders as to whether training has prepared them for their respective mission and environment.
 - (13) Synchronization of training audits. (Appropriate timing of cyclical reviews so training audit results can be utilized.) Gather information from audits and other information sources to reflect upon how to make curricula better.
 - (14) Look at Military Occupational Specialty (MOS)/Navy Rating/Air Force Specialty Code (AFSC)/Navy Enlisted Classification (NEC)/ plans for future initiatives, consolidations, additions, deletions, etc.
 - (15) Training equipment concerns.
 - (16) Instructional design and technology issues.
 - (17) Attrition and student input and phasing issues.
 - (18) Manpower allocations, staffing levels and instructor effectiveness concerns.
 - (19) Student quality of life issues.
 - (20) Accreditation Issue.
- b. Internal Schoolhouse Consolidated Curriculum Review. Normally this review is conducted in accordance with Host Service policy and has no resource impact to participating Services. All participating Services will participate in the review and concur with curriculum modifications. ITRO involvement is not necessary for this review.

5. Procedures for Withdrawal from Interservice Consolidation.

- a. Withdrawal from an ITRO consolidation is discouraged. Adjustments to curriculum are normally utilized instead, to avoid withdrawal of participating Services. A consolidation may be terminated, however, under certain conditions. A Service desiring to withdraw from an ITRO approved consolidation will withdraw only after providing reasons in writing. Service desiring to withdraw from interservice training will provide written notification to their respective ITRO office for staffing through the Secretariat for DEB/DMRTEC review. HC withdrawal notification will come from the Service's ITAB member and submitted to the HC ITO for staffing. The letter of intent must be provided at least one year in advance of the withdrawal to provide for resource adjustments. An ITRO RRA will be conducted to verify resource impacts and to provide a basis for resource transfers. A withdrawal may also occur with mutual consent of participating Services. The Steering Committee will review and the DEB/DMRTEC will review all withdrawal actions.
- b. When a consolidated course host decides to discontinue or outsource that course, rules similar to above apply. Notification will be made, however, when the host commences any action likely to result in discontinuance or outsourcing, but not later than one year before actual discontinuance or outsourcing. The former host will MIPR to the new host the resources calculated using the most recent budget quality cost factors until a budget based transfer is accomplished to permanently move the resources. If a course is discontinued, the Cost Committee will convene a meeting, when appropriate, to determine budget based *refund* amounts to each participating Service. If the course is outsourced, the host will be expected to continue to fully fund the training.

6. Procedures for Outsourcing Interservice Training.

Notification of an outsourcing study intent (e.g., A-76) will be made to the Secretariat one year prior to commencement of the study. As soon as possible after notification, all participants will meet to evaluate all possible outcomes. Each participating Service will address how these outcomes will be resourced. Resourcing decisions may be negotiated between the host and participating Services. Each participating Service will have the option to fully participate in the study, collocate the training outside of the study, or relocate to another site. Notification to participate in the outsourcing study will be provided in writing to the Secretariat within appropriate timelines. If a participating Service decides to withdraw, procedures in paragraph 6 above apply.

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Chapter 6

RESOURCING

1. Rules of Engagement

- a. Civilian Personnel Transfer Rules/Instructions. Where O&M dollars and civilian FTEs are identified by the host, the participating Service will transfer dollars and FTEs to meet the host requirement. If the participating Services' budget baseline is less than the host Services' requirements, the participating Service may decline to consolidate or may negotiate an agreement with the host. The negotiation will take place prior to DEB decision. No military resources will transfer.
- b. One-Time Costs. The Operations and Maintenance (O&M) one-time costs identified for non-Service-unique requirements in an ITRO study will be fair shared. Services will prorate costs based on ADSL. All transfers will be subject to appropriate regulations and laws. "Other Procurement" one-time costs identified for non-Service-unique requirements will not normally be fair shared. However, circumstances may dictate the need for participating Service(s) to procure an item.
- c. Study Factors for Budget Based Transfer (BBT). The BBT will be based upon Deputy Executive Board approved study factors that existed at the time of the study. Standard DOD inflation factors will be used to inflate dollars to current year dollars. The Manpower Committee will determine the number of BOS personnel and the appropriate mix (and other appropriate procedures).
- d. Recurring Resource Requirements following a BBT effected since 1993. The host Service will absorb changes in participating Service's non-unique requirements up to a \$100K threshold (\$25K for DHP programs). Beyond this threshold, the participating Service will issue an execution year transfer (usually a MIPR) to the host or, in the case where requirements decrease, receive an execution year transfer from the host until a BBT is accomplished to permanently realign the dollars.
- e. Funding responsibilities if the Host or One or More Participating Service(s) no longer has formerly Consolidated Training Requirement. The former host Service will MIPR to new host resources calculated using the most recent budget quality cost factors until a budget based transfer is accomplished to permanently move the resources. If there is no longer a training requirement on the part of the participating Service, there will be no refund.
- f. Basis of Military Interdepartmental Purchase Request (MIPR) Payments. The DEB-approved-transfer will be modified for changes in the ADSL identified at least 4 months prior to the issuance of the MIPR to provide enough time to meet financial time lines. The MIPR is normally issued on 1 Oct of the new fiscal year.
- g. Base Operating Support (BASOPS) for Training Detachments. The host pays all the BASOPS for detachments, unless the support desired is above that normally provided to all tenants.
- h. Funding Responsibilities if a quota course is converted to an Interservice course. The host Service may request a partial or full ITRO study to establish the long-term impact of establishing an Interservice course. Regardless of level of study, a Memorandum of Agreement is required.
- i. Student Arrival and Departure. Each Service, to the maximum extent possible, has the obligation to minimize the "hold" time for students awaiting training.
- j. Instructor Fair Share. If a Service does not provide its fair share of instructors, the Host and/or Participating Service(s) will contact their Steering Committee member for resolution. It may be necessary to reduce a Service's student input accordingly.

2. Budget Based Transfers (BBT)

- a. Procedures. Procedures for approved ITRO consolidation/collocations. BBT requires each participating Service to submit an agreed to resource transfer exhibit to OSD. This exhibit defines the recurring O&M dollars to be transferred to/from each Service's Future Years Defense Plan (FYDP) baselines. This exhibit will be submitted during the Budget Estimate Submission (BES) cycle. This cycle occurs each fiscal year during the summer. The time lines for submission will require each Service's Training and Medical Commands to submit the agreed to resource transfer exhibit to their respective Service department level office of primary responsibility at various times (No later than 1 August for Air Force, Navy, and Marines, and mid-February for the Army) to meet specific department suspense. The submission must meet these time lines to allow sufficient time for coordination at the Service Department Level. In regards to the Medical Commands, the mission (and also BOS for Army medical) related

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resource transfers will be accomplished through the appropriate Secretary of Health Affairs Office in the DOD.

b. Responsibilities

(1) The Resource Coordinator (USAF Steering Committee member) will facilitate accomplishing BBTs between Services. The Cost Committee chair will coordinate efforts of the Services.

Responsibilities include the following:

(a) Initiate BBTs after final implementation of approved ITRO studies, normally after second full year of initiation of training.

(b) Establish milestones for the Services' training commands and the medical command BBT representatives to submit data for resource transfer exhibit; complete all internal/external coordination, and submit to respective Service's department level representative to meet BES cycle requirements.

(c) Complete resource transfer exhibit for data received from Services' BBT representative and return for validation and coordination.

(d) Prepare memorandum to be signed by each participating service, which will accompany Services' submission of transfer amounts to OSD. Memo will state nature of the transfers and that all involved Services agree with the amounts contained in the transfer exhibit.

(e) Coordinate with each Service's BBT representative to ensure all BBT actions are accomplished and track progress against established milestones.

(f) Submit periodic BBT progress updates to Resource Committees Coordinator.

(2) The Services' training commands and medical training commands will designate a BBT representative from the appropriate office of responsibility. Representatives' responsibilities include the following:

(a) Provide all necessary data to accomplish the resource transfer exhibit requested by the Cost Committee Chairman.

(b) Validate the final resource transfer exhibit.

(c) Complete all necessary internal/external coordination to meet established milestones.

(d) Provide coordinated resource transfer exhibits to Service Department level representatives by established milestones.

(e) Submit BBT progress updates to the Cost Committee Chairman and ITRO Secretariat.

c. Cost Committee Chairman Requirements

(1) Notify Service BBT representatives of the proposed BBT action NLT October prior to the upcoming BES and request necessary data for resource transfer exhibit.

(2) Provide Service BBT representatives with BBT milestones. These milestones will require resource transfer exhibit data to be submitted by October prior to the BES, validation of the completed resource transfer exhibit by November, completion of the internal/external coordination by end of December, and submission to Services' department level representative per the timelines stated in paragraph 2a. Program Budget Decisions will be written by OSD, based upon this coordinated position.

(3) Complete resource transfer exhibit (see Figure 4-5) from Services' BBT representative submissions.

(4) Forward completed resource transfer exhibit to Services' BBT representatives for validation and subsequent coordination and submission to Department Level Representative.

(5) Track progress of BBT actions and provide updates at each milestone completion to the Resource Committees Coordinator.

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INTERSERVICE TRAINING REVIEW ORGANIZATION (ITRO) ARMY & AIR FORCE FY 00 PROGRAM BUDGET DECISION INPUT										
DOLLARS (000)										
ISSUE LABEL	MDEP	PROGRAM ELEMENT	PE/SAG	COMMAND	CMD CODE	FY 00	FY 01	FY 02	FY 03	FY 04
BASOPS (NON-MEDICAL)	QDPW	325779.N	032A	TRADOC*	57	\$1,544	\$1,578	\$1,613	\$1,649	\$1,691
MISSION (NON-MEDICAL)	TFNC	3217311	032A	TRADOC	57	\$81	\$83	\$85	\$87	\$90
MISSION (NON-MEDICAL)	TFNC	3217312	032A	TRADOC	57	\$191	\$196	\$200	\$206	\$211
BASOPS (NON-MEDICAL)		085796	032Z	AETC**	64	-\$1,544	-\$1,578	-\$1,613	-\$1,649	-\$1,691
MISSION (NON-MEDICAL)		084731	032A	AETC	64	-\$272	-\$279	-\$285	-\$293	-\$301
MANPOWER										
ISSUE LABEL	MDEP	PROGRAM ELEMENT	PE/SAG	REIMB	COMMAND	CMD CODE	UIC	C TYPE	FY 00	FY 01
MISSION (NON-MEDICAL)	TFNC	3217312	032A	C	TRADOC	57	W1E1	GS101	1	1
MISSION (NON-MEDICAL)		084731	032A	S	AETC	64	-	10	-1	-1
BASOPS (NON-MEDICAL)	QDPW	325779.N	032A	C	TRADOC	57	WOVL	GS101	7	7
BASOPS (NON-MEDICAL)	QDPW	325779.N	032A	C	TRADOC	57	WOUV	GS101	2	2
BASOPS (NON-MEDICAL)	QDPW	325779.N	032A	C	TRADOC	57	WOU5	GS101	8	8
BASOPS (NON-MEDICAL)		085796	032Z	S	AETC	64	-	10	-17	-17
NOTE: The dollars for the above civilian spaces are already included in the O&M dollars depicted in the Dollars section of this exhibit.										
* TRADOC stands for the Training and Doctrine Command										
** AETC stands for Air Education and Training Command										

Figure 6-1, PBD Input

d. Services BBT Representative Requirements

(1) Provide all necessary data requested by the Cost Committee Chairman in the required format (Figure 6-1) by milestone date. Providing this data will require the ADSL and manpower calculations to be validated by each Service's ITRO Manpower representative.

(2) Validate upon receipt the proposed resource transfer exhibit and notify the Cost Chair, in writing, of status by established milestone date.

(3) Upon notification by the Cost Chair, staff/coordinate validated resource transfer exhibit and forward to appropriate Department Level Office of Primary Responsibility by milestone date.

(4) Track progress of resource transfer exhibit and keep Cost Committee Chairman informed.

3. Future Years Defense Plan Adjustments. The Planning, Programming, and Budgeting System (PPBS) is designed to assure resources are present when execution is required. In consonance with PPBS, each service has a process for identifying requirements. Each service's program manager must assure that student input for ITRO courses is provided to the other services during each scheduled requirements planning event. For courses with a recognized capacity problem, the service program managers must resolve student input for each service prior to the scheduled planning event.

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FY 00 PBD SUPPORT DOCUMENT

MOTOR TRANSPORT OPERATOR O&M TRANSFER AMOUNTS

LOCATION OF TRAINING: Fort Leonard Wood

TRANSFERRING FROM Air Force

TRANSFERRING TO: Army

TRANSFER AMOUNTS

	<u>WORKLD</u>	<u>FY00 \$</u>	<u>BOS CIVILIANS</u>
BOS PAY	64	72,140	2
BOS NP	64	90,951	
BOS SUB TOT		163,090	
MSN NP	0	-	
TOTAL		\$ 163,090	2

BASIS FOR TRANSFER AMOUNTS

<u>FY 00 CONSOL LOAD</u>	<u>FY 00 COLLOC LOAD</u>	<u>FY 00 PERM PARTY</u>	<u>TOTAL POP</u>	<u>BOS MP FACTOR**</u>	<u>PERCENT MILITARY**</u>	<u>BOS NP FACTOR**</u>	<u>MSN NP FACTOR**</u>	<u>BOS AVG CIV SALARY**</u>
0	45	19	64	0.036	25.8%	\$ 1,335	\$ 448	\$ 31,875

NOTES:

** Taken from October 94 implementation study and expressed in FY 96 dollars.

Inflation Factors (FY 96 to FY00): Civ Pers Non-Pers
 1.1316 1.0645

Leonard Wood POC: Cliff Hammock, DRM, DSN 676-4065

Figure 6-2, PBD Support Document Sample

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Chapter 7

MANPOWER ANALYSIS PROCEDURES AND GUIDELINES

1. **Manpower Analysis Committee.** The mission of the Committee is to provide guidance/support to the DAG/QLG on manpower issues; determine/validate manpower requirements associated with proposed consolidations/collocations; conduct audits of existing consolidated/collocated ITRO courses as required; and maintain a manpower audit trail for consolidation/collocation studies. Provide manpower support to the Cost Analysis and Facility Analysis committees by computing manpower requirements and ADSL to implement and sustain consolidation/collocation of training. Members of the Manpower Analysis Committee include:

Navy (Chair)	Chief of Naval Education and Training (/ETE431) 250 Dallas Street Pensacola, FL 32508-5220 DSN 922-3889 Comm (850) 452-3889
Army	Headquarters Training and Doctrine Command ATTN: ATRM-FT Fort Monroe, VA 23651-5388 DSN 680-5362 Comm (757) 727-5362
Marine Corps	Training and Education Command (C460) 2008 Elliot Road Quantico, VA 22134-5001 DSN 278-3085/3064 Comm (703) 784-3085/3064
Air Force (AF Medical)	Headquarters Air Education and Training Command (XPMRT) 1 "F" Street, Suite 102 Randolph AFB, TX 78150-4325 DSN 487-2095 Comm (210) 652-2095
Training Resource Coordinator	Headquarters Air Education and Training Command (DOZ) 2 "F" Street, Suite 2 Randolph AFB, TX 78150-4325 DSN 487-6363 Comm (210) 652-6363
Army—Medical	AMEDDC&S (MCCS-R) 2250 Stanley Road Fort Sam Houston, TX 78234 DSN 471-7348
Navy—Medical	BUMED-55 2300 E Street NW Washington, DC 20372 DSN 762-3820

a. Manpower Analysis Committee representation will be provided to all DAG resource requirements analyses unless Facilitating Service states otherwise.

b. The following guidelines for computing instructors for consolidation/collocations are provided:

(1) The DAG is responsible for providing course model information to the Manpower Analysis Committee. ITRO Form 3 documents the required information.

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(2) All "before" (baseline) consolidation instructor requirements are to be identified using the instructor computation system unique to the individual Service. Instructor manpower requirements for any consolidated training will be computed using the ITRO instructor computation formula (Figures 13 and 14). Service unique tracks will be considered collocated. Each Service's unique instructor computation will be used to determine instructor requirements for Service unique tracks.

(3) The ITRO Manpower Analysis Committee on a case-by-case basis will address any proposed deviations from the above stated computational procedures.

(4) Instructor manpower requirements for collocated courses will be computed using each Service's own computation procedure.

(5) Constant changes in annual training requirements make it impractical to assume manpower authorizations in the out years reflect requirements. Therefore, all identification of manpower needs should be based on computed requirements and not existing authorizations.

(6) All student/instructor ratios within each course will be set at that point which yields the highest possible ratio without serious detriment to the quality of instruction. Student to instructor ratios, not instructional situations, will be use in computing instructor requirements.

(7) The Manpower Analysis Committee will address the minimum skill/grade level required for each function.

(8) For consolidated courses, instructor requirements for each Service will be a "fair-share" based on that Service's percentage of the total planned student input.

(9) When computing instructor manpower requirements for a course, maximum class size will be used unless it can be shown that other scheduling is more efficient.

(10) Instructor manpower requirements will be computed based on 40 hours of approved academic curriculum topics per week. Other requirements will occur outside of the training workweek requirement.

(11) All numbers used in the instructor computation will be taken to 2 decimal points. Instructor requirements will be rounded using rounding table in Figure 7-1.

FRACTIONAL MANPOWER REQUIRED		
BETWEEN...	...AND...	...ROUNDS TO
.001	1.077	1
1.078	2.154	2
2.155	3.231	3
3.232	4.308	4
4.309	5.385	5
5.386	6.462	6
6.463	7.539	7
7.540	8.166	8
8.167	9.693	9
9.694	10.770	10
10.771	11.847	11
11.848	12.924	12
12.925	13.999	13
14.000	14.999	14
15.000	15.999	15
ETC.	ETC.	ETC.

Figure 7-1, Fractional Manpower Rounding Table

c. The following guidelines for determining Detachment, Training Support/School Overhead, BOS, and Student Load are provided:

(1) Detachment requirements will be computed using each participating Service's methodology.

(2) Base Operating Support (BOS) personnel requirements for the study will be determined using each participating Service's factors. The Manpower Committee will provide the BOS personnel

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requirement to their respective Cost Analyst. Fractional BOS Personnel requirement that is less than one will not be rounded. Fractional BOS Personnel requirement that is more than one will be rounded to the next whole number at 0.8. (NOTE: needs to be staffed with Manpower Committee)

(3) Training support/school overhead requirements will be identified/validated on a case-by-case basis by the ITRO Manpower Analysis committee and approved during normal staffing.

(4) Average daily student load (ADSL) will be computed using student input, multiplied by course length in training weeks, and divided by 50. All fractional ADSL for the study will be totaled and rounded to the next higher whole number at 0.5.

(5) The Service's manpower committee representative will identify planned student input for computations.

(6) Distance learning situations for consolidated training will be addressed on a case-by-case basis. The DAG will ensure the committee is informed if any consolidated training will be taught using a form of distance learning; i.e., VTT, VTC, CBT, etc.

(7) To account for student check in/out processing and determine population change for BOS costs/savings, analysts will add .5 days per week (.1 weeks), up to a maximum of 2 days (.4 weeks), to the course length for proposed consolidated courses for Army and Marine Corps. Navy and Air Force will add these times to both the baseline and proposed course lengths. No instructor hours will be allowed for the additive.

d. The following information is included for guidance when determining manpower requirements for consolidated/collocated training.

(1) Training support/direct support is work performed by the School and for the School only. The support requires full time dedication to the School operation and is there to support the School/training. Instructors are required to perform some training support functions and their time to accomplish these duties is computed in the 1.26 Instructor Prep and Related duties/Working Level factor in the ITRO Instructor Computation formula. Training support functions include, but are not limited to, the following:

- (a) Supervision of Staff – leave approval, evaluation prep, safety compliance
- (b) Proficiency Evaluations
- (c) Classified Material Handling
- (d) Planning, programming, and budgeting for replacement of training support material, training aids and equipment.
- (e) Maintaining current instructor guides, curriculum and tests
- (f) Counseling of students
- (g) Integration of risk management and enforcement of safety regulations
- (h) Publications, training aids, equipment and materials accountability
- (i) Inspections
- (j) Functional control over student critiques, testing, curricula documentation reviews, classroom monitoring and in-service training
- (k) Quality assurance of training
- (l) Providing directions, guidance and assistance to instructors in writing or re-writing curricula
- (m) Liaison with facilities and schoolhouse personnel
- (n) Conducting debriefing of newly assigned instructors
- (o) Monitoring enrollment/disenrollment procedures
- (p) Qualifying new instructors
- (q) Maintaining training aids
- (r) Contract oversight

(2) Base operating support (BOS) are functions that support the installation and do not support a single activity aboard the installation. The support is indirect and general in nature. BOS functions include, but are not limited to, the following:

- (a) Command support
- (b) Information management
- (c) Logistics
- (d) Comptroller
- (e) Civilian Personnel
- (f) Engineering, Public Works
- (g) Safety
- (h) Family Services
- (i) Food Services

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- (j) Education Services
 - (k) Morale, Welfare and Recreation
 - (l) Security
 - (m) Bachelor Quarters
 - (n) Chaplain
 - (o) Legal
 - (p) Supply
 - (q) Fire Department
 - (r) Audio Visual
 - (s) Equal Opportunity
 - (t) Contract management
 - (u) Health Services (Hospital, Sick Call, etc)
- e. Manpower Analysis Committee Chairman will call committee meetings as necessary. Minutes of the committee meeting will be prepared and agreed to by all members.
- f. Revisions/modifications to manpower analysis procedures will be made as required by ITRO Manpower Analysis Committee. Revisions/modifications will be agreed on by all members and submitted for inclusion in the Procedures Manual.
- g. Manpower Committee representatives will brief the DAG on the results of the computations.
- h. Manpower requirements audit forms will be used to provide information to Cost Analysis and Facilities Analysis Committees.

2. Manpower Requirements Determination. It is the responsibility of the DAG to provide the information necessary to determine manpower requirements. A member(s) of the Manpower Analysis Committee will be available to assist in gathering the necessary data and to apply the appropriate ITRO formula. In addition, it is the responsibility of each Service's Manpower Analysis Committee member to validate the requirements for his Service. The Manpower Analysis Committee, prior to consolidation, will ensure that student/instructor ratios, class size, and convening frequency are set at optimum points. This analysis may include a review of configuration of training facilities and equipment. The formulas/forms in this chapter have been developed for use in determining instructor manpower requirements.

3. Instructor Computations. Two instructor computation forms (Figure 7-2 and Figure 7-3) have been designed to record all necessary data and to simplify the computation procedure. The following Instructor instructions apply to both forms, and are followed by additional instructions for Mobile Training Team computations.

- a. Section I contains the planning information required; e.g., course identification, student input, course length, class sizes, and number of classes scheduled for training. Fractional class sizes or number of classes programmed will normally be rounded to the next whole number.
- b. Section II breaks out a course curriculum by training situation and gives the number of syllabus (hours of instruction) hours and the student to instructor ratios for each training situation. The sum of the syllabus hours will equal the program of instruction (POI). Syllabus hours used for computing instructor requirements will not include nonacademic hours (General Military/Physical Training); an exception may be made if this type of training is an integral part of the training requirement for the specialty; i.e. Survival Training. When determining instructors required for each training situation, instructor man-hours required will be carried to two decimal points. From this information, the number of instructor man-hours required to teach one class is computed.
- c. Section III is the computational process that determines total instructor requirements. It includes a factor of 1.26 for working level supervision of the course and instructor preparation and related duties. Functions performed by working level supervisors include, but are not limited to, instructor break-in, instructor evaluation, scheduling of students, scheduling of instructors, reports and administrative, consultation with instructors, trainee evaluation, liaison (phases and courses), and curriculum maintenance. Instructor preparation and other related duties consist of lesson plan update, preparation of handouts, training aids, set-up of demonstrations, slides, movies, equipment/tool inventory, grading and recording grades, building security, classified materials, student counseling, records, technical manual updates, consultation with supervisors, curriculum maintenance, remedial training, and rehearsals. The average monthly man-hours available factor of 145 includes allowances for leave, medical, military duties, etc. (i.e. contingent unavailable). Fractional instructor requirements will be rounded in accordance with Figure 7-1. However, when more than one course is being considered for consolidation and the courses are compatible enough to cross-utilize instructors, fractional instructor requirements of courses will be

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totaled and then rounded in accordance with Figure 7-1. In rare instances, such as low-flow, equipment-oriented courses where instructor cross-utilization is not feasible, there may be a need to establish a minimum instructor requirement for the course. The Committee will evaluate these situations on a case-by-case basis.

(1) If an instructor requirement adjustment is determined necessary by the ITRO Manpower Analysis Committee, the adjustment will be expressed as an additive/subtractive. The Subject Matter Expert or other appropriate schoolhouse personnel must justify the adjustment, in writing. As stated above, these will be determined on a case-by-case basis. The exception will be included in the ITRO Instructor Computation worksheet as a separate line to identify the instructor contact hours (ICH) required for the exception. Additionally, a separate note should be added to the worksheet to provide rationale/justification for the exception.

(2) For quota courses, the ITRO Instructor Computation formula is not required to determine instructor requirements but can be used if all parties agree.

d. Section IV will reflect the instructor requirement as apportioned by Service. The rounded instructor requirement computed in Section III will be apportioned, on a "fair share" basis, among the host and participating Services based on the percentage of total student input from each Service. Normally, fractional requirements for an individual Service will be rounded up if .5 or higher. However, the total of the individual Service requirements will be adjusted, if necessary, to equal the total instructor requirement as computed in Section III.

4. Special Instructions for Mobile Training Team (MTT) Instructor Computation

a. An instructor computation form (Figure 7-3) has been designed to record all necessary data and to simplify the computation procedure. The procedure for determining instructors required for MTT courses is basically the same as for lockstep courses. Modifications are described below.

b. Section I planning data has been expanded to include annual travel hours (ATH). This is determined by taking annual travel day's times eight hours per day times the number of travelers. The annual travel days will be based on the projected schedule of the MTT. The lowest student to instructor ratio identified in Section II of the computation form will be the number of personnel required for the MTT team and equate to the number of travelers. This data is normally provided by the host Service and will be validated by committee members.

c. Section III has been modified to allow for the travel time associated with MTT. Factors allowed for working level supervision and instructor preparation and related duties (1.26) are identical to those allowed in the lockstep formula. Annual travel hours will be added to annual instructor hours to allow for the impact of travel time to instructors required.

d. Section II and IV are identical to the lockstep instructor computation form and procedures defined in the lockstep formula will be used.

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ITRO INSTRUCTOR COMPUTATION (LOCKSTEP)					
SECTION I COURSE DATE			DATE:	15-Sep-97	
			OPTION:	Option 1	
			COURSE #:	Host Service Course Number	
			TAUGHT AT:	Site Location	
COURSE TITLE: Training Example					
PROGRAMMED ANNUAL INPUT			% OF INPUT		
USA	130	41.01%	COURSE LENGTH (CALENDAR DAYS):		47
USN	84	26.50%	COURSE LENGTH (TRNG DAYS):		35.00
USMC	36	11.36%	COURSE LENGTH (WKS+4 PROCESSING		7.40
USAF	55	17.35%	TOTAL SYLLABUS HOURS		274.50
USCG	12	3.79%	PROGRAMMED # CLASSES/YR		10.57
TOTAL	317	100.00%	ROUNDED INTERATIONS:		11.00
SECTION II CIRRICULUM BREAK OUT					
TRAINING SITUATION	PROGRAMMED CLASS SIZE	MAX /RATIO	= INSTRUCTORS REQUIRED	SYLLABUS XHOURS	INSTRUCTOR =MANHOURS
LECTURE	30.00	30.00:1	1.00	155.50	155.50
DEMO	30.00	6.00:1	5.00	205.50	
PERF EXAM	30.00	5.00:1	6.00	55.00	330.00
EXAM	30.00	3.00:1	10.00	12.00	120.00
WRITTEN TEST	30.00	15.00:1	2.00	2.00	4.00
TOTAL INSTRUCTOR MANHOURS/CLASS:				274.50	1481.50
SECTION III INSTRUCTOR COMPUTATION					
TOTAL INSTRUCTOR HOURS PER CLASS X PROGRAMMED # OF CLASSES=ANNUAL INSTRUCTOR CONTACT HOURS				16296.50	
ANNUAL INSTRUCTOR CONTACT HOURS X 1.26 (SUPERVISION, PREPARATION AND RELATED DUTIES)=ANNUAL INSTRUCTOR HOURS				20533.59	
ANNUAL INSTRUCTOR HOURS/12=MONTHLY INSTRUCTOR HOURS				1711.3	
MONTHLY INSTRUCTOR HOURS/145=INSTRUCTORS REQUIRED				11.80	
SECTION IV INSTRUCTOR REQUIREMENTS BY SERVICE					
USA	USN	USMC	USAF	USCG	TOTAL
4.84	3.13	1.34	2.05	0.45	11.80
5.00	3.00	2.00	2.00	1.00	13.00
AVERAGE DAILY STUDENT LOADS (ADSL)					
20	13	6	9	2	50
REMARKS					
Because ITRO Course requires 12 Instructors, one Service will be allowed to reduce their requirement--Probably USCG.					

FIGURE 7-2, Standard ITRO Instructor Computation

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ITRO INSTRUCTOR COMPUTATION (MOBILE TRAINING TEAM)					
SECTION I COURSE DATE			DATE:	26-Sep-97	
			OPTION:	Option 1	
			COURSE #:	Host Service Course Number	
			TAUGHT AT:	N/A	
COURSE TITLE: Training Example					
PROGRAMMED ANNUAL INPUT			% OF INPUT		
USA	175	52.24%	COURSE LENGTH (CALENDAR DAYS):		42.00
USN	55	16.42%	COURSE LENGTH (TRNG DAYS):		31.00
USMC	25	7.46%	COURSE LENGTH (WKS+4 PROCESSING		6.60
USAF	70	20.90%	TOTAL SYLLABUS HOURS		246.00
USCG	10	2.99%	PROGRAMMED # CLASSES/YR		11.17
TOTAL	335	100.00%	ROUNDED INTERACTIONS:		12.00
ANNUAL TRAVEL DAYS X 8 HOURS PER DAY X NUMBER OF TRAVELERS=					64.00
SECTION II CIRRICULUM BREAK OUT					
TRAINING SITUATION	PROGRAMMED CLASS SIZE	MAX /RATIO	= INSTRUCTORS REQUIRED	SYLLABUS XHOURS	INSTRUCTOR =MANHOURS
NON-ACADEMIC	30.00	30.00:1	0.00	5.00	0.00
LECTURE	30.00	30.00:1	1.00	50.00	50.00
PRAC APP	30.00	15.00:1	2.00	175.00	350.00
PRAC EXAM	30.00	6.00:1	5.00	15.00	75.00
WRITTEN TEST	30.00	15.00:1	2.00	6.00	12.00
TOTAL INSTRUCTOR MANHOURS/CLASS:				246.00	487.00
SECTION III INSTRUCTOR COMPUTATION					
TOTAL INSTRUCTOR HOURS PER CLASS X PROGRAMMED # OF CLASSES=ANNUAL INSTRUCTOR CONTACT HOURS				5844.00	
ANNUAL INSTRUCTOR CONTACT HOURS X 1.26 (SUPERVISION, PREPARATION AND RELATED DUTIES)=ANNUAL INSTRUCTOR HOURS				7427.44	
ANNUAL INSTRUCTOR HOURS/12=MONTHLY INSTRUCTOR HOURS				618.95	
MONTHLY INSTRUCTOR HOURS/145=INSTRUCTORS REQUIRED				4.27	
SECTION IV INSTRUCTOR REQUIREMENTS BY SERVICE					
USA	USN	USMC	USAF	USCG	TOTAL
2.23	0.70	0.32	0.89	0.13	4.27
2.00	1.00	0.00	1.00	0.00	4.00
AVERAGE DAILY STUDENT LOADS (ADSL)					
24	8	4	10	2	48
REMARKS					

FIGURE 7-3 MTT Instructor

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Chapter 8

FACILITIES ANALYSIS PROCEDURES AND GUIDELINES

1. **Introduction.** The Army chairs the Facility Committee with members representing Navy, Air Force, and Marine Corps. The Facilities Committee is responsible for procedures and studies related to effective use of existing and future facilities for proposed consolidation and/or collocation among military Services. The purpose and functions of the Facilities Committee are outlined in Chapter 2, paragraph 8j, of this manual. Members of the Facilities Analysis Committee include:

Army Chair	Headquarters Training and Doctrine Command ATTN: ATBO-GPL Fort Monroe, VA 23651-5388 DSN 680-2554 Comm (757) 727-2554
Marine Corps	Training and Education Command (C474) 2042 South Street Quantico, VA 22134-5027 DSN 278-4056 Comm (703) 784-4056
Air Force (AF Medical)	Headquarters Air Education and Training Command (CEPR) 1 "F" Street, Suite 102 Randolph AFB, TX 78150-4325 DSN 487-6200 Comm (210) 652-6200
Training Resource Coordinator	Headquarters Air Education and Training Command (DOZ) 2 "F" Street, Suite 2 Randolph AFB, TX 78150-4325 DSN 487-6363 Comm (210) 652-6363
Army—Medical	AMEDDC&S (MCCS-R) 2250 Stanley Road Fort Sam Houston, TX 78234 DSN 471-7348
Navy—Medical	BUMED-55 2300 E Street NW Washington, DC 20372 DSN 762-3820

2. **Organization Of The Facility Report**

- a. A narrative is prepared which includes a general description of the objectives, scope, assumptions, methodology, and facility cost factors. Following the narrative are calculations and summaries of facility requirements and facility cost computations by option.
- b. Figure 8-2 is a sample Facilities Report outline. The make-up of options in a study may require changes to this outline in order to include all required data and computations. The facilities report will include the following information:
 - (1) What billeting spaces are available during peak period?
 - (2) How many spaces would the ITRO course consume?

3. **Methodology**

- a. General. The criterion provides general guidelines for the studies to be addressed by ITRO and constitute a method of analysis, which evaluates all options on the same standard. The facility requirements and cost computations by option include student and staff personnel loading, facility

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requirements, existing assets, construction required and/or facility alteration/modification required to provide the necessary training, billeting and dining facilities to support the study. Any construction/alteration/modification costs are then computed using cost factors from the current DOD Guide. These cost factors include construction cost per square foot; supporting facilities factor; contingency factor; supervision, inspection, and overhead factor; and an area cost factor which adjusts the cost to reflect local cost. New construction is included for only the additional facilities required. The cost of alteration of existing facilities depends on the scope of the changes required. In ITRO Studies, the costs of major alterations are estimated on the basis of 60% of the cost of new construction and minor alterations on the basis of 30% of new construction. Since minor costs are associated with any change of room use, the facility cost estimates include a small dollar amount to cover the cost of any required minor modifications, such as additional electrical service in a room, change in access door configuration or other minor change to an existing space. This is normally \$10/SF times the existing area that is not otherwise altered times the area cost factor. The computations also include any cost avoidance that may be generated by relocating the training being studied. There may be unusual circumstances, which require adjustment on a case-by-case basis. These situations should occur infrequently and require general consensus of the Facilities Committee.

(1) Student load figures are the basic inputs that drive the entire analysis. Members of the Manpower Committee provide their Service's projected consolidated, collocated, and service unique average on board/average daily student load (AOB/ADSL) and staff numbers for each option (See Figure 8-2). The projected FY must agree with the FY used for costing. Student loads must be identified by pay grade categories and travel status as indicated in Figure 8-2, to adequately define billeting requirements.

(2) Once the total student and staff personnel load is established by the Manpower Committee and provided to the Facilities Committee, this data will be used in conjunction with data provided by DAG/SME members to calculate facility requirements.

(3) Should a service require accommodations above the DOD standard, it is the responsibility of that service to fund the additional cost.

(4) BRAC. When a BRAC construction project is involved in an option that project is considered to be required construction (as opposed to existing facilities) and if the scope is not changed, the cost is considered to be the BRAC estimated project cost. In cases where there is a change in scope, standard ITRO cost estimating methods and unit costs will be used.

b. Billeting and Housing Requirements

(1) The ITRO Facilities Committee will base billeting requirements on the DOD Military Handbook for construction and DOD 4165.63M for utilization (Figure 8-1).

FIGURE 8-1, ITRO Bachelor Housing Standard

ITRO UEPH BACHELOR HOUSING STANDARDS FOR STUDENTS			
GRADES	STATUS	NEW CONSTRUCTION (MIL-HDBK 1036A)	UTILIZATION DOD 4165.63M Table 5-1
E1 - E4	NPS or TDY	850 GSF/MOD; 4/MODULE	90 NSF, CB, 4/SR*
E1 - E4	PCS and PS	710 GSF/MOD; 2/MODULE	90 NSF, CB, 4/SR*
E5 - E6	TDY	850 GSF/MOD; 2/MODULE	135 NSF, 2/SB, 2/SR
E5 – E6	PCS	(DO NOT BUILD)	135 NSF, 2/SB, 2/SR
W1 – 02	TDY	850 GS/MOD; 1/MODULE	N/A
W1 – 02	PCS	(DO NOT BUILD)	250 NSF, PR, PB
A Module is two Sleeping Rooms and possibly a Connecting Bath.			
SR – Sleeping Room PR – Private Room OB – Open Bay PS – Prior Service (Includes Specialized Skill Trng) PCS – Greater Than 20 Weeks % - Need Average % Married		CB – Central Bath SB – Shared Bath PB – Private Bath NPS – Non-Prior Service (All Initial Skills Trng) TDY – Less Than 20 Weeks	
*DOD 4165.63M Allows Open Bay Quarters, But Open Bay Unacceptable for ITRO Studies 79 GSM = 850 GSF (2 + 2 Configuration) 66 GSM = 710 GSF (1 + 1 Configuration)			

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(2) For the purpose of ITRO studies, students are defined as either personnel in initial skills training prior to their first permanent duty assignment, or personnel attending advance-training programs/courses in either a temporary or permanent duty status. The ITRO process does not include Basic or Recruit Training. Enlisted billeting requirements will be developed on the basis of 90 net square feet per space, with a maximum of four spaces per room. One space is allowed for each student in pay grades E1 through E4 and two spaces are allowed for each student in pay grades E5 and above. Officer billeting requirements will be developed on the basis of 250 NSF per space with one student per space.

(3) The following Management Factors are used by ITRO in computing billeting requirements to adjust for surge or peak periods (Data from Subject Matter Experts (SME) should not include management factors):

(a) E1 - E4 students: $(20\% \times \text{AOB/ADSL})$

(b) E5 and above: $(15\% \times \text{AOB/ADSL})$

(c) O1, O2, W1, W2: $(15\% \times \text{AOB/ADSL})$

(4) Grade Adjustment Factor: Each student E5 and above is allowed two billeting spaces.

(5) Total number of enlisted billeting spaces required equals AOB/ADSL plus management factor adjustment plus grade adjustment.

(6) Total student housing requirements for consolidated, collocated, and all other training is compared to the available assets at each location to determine if construction of additional billeting assets is required.

(7) Each gaining installation will provide a written assessment of the ability of the off-base housing community to support the projected increased load. Family housing is not considered unless conclusive justification is provided showing that the local area cannot satisfy the requirement.

(8) Costing for each option considered in a study will include the cost required to upgrade existing facilities to meet minimum DOD standards for utilization.

(9) All new construction of unaccompanied personnel housing will be based on Figure 8-1, or most current standard. Ten percent will be added to all new construction cost to account for furniture/furnishings.

(10) Any existing facilities offered to support the study should meet minimum quality standards (i.e., facilities should meet or exceed the minimum maintenance standards of the installation).

c. Dining. Capacities of enlisting dining facilities are based on a serving time of 120 minutes assuming 4 seatings at 30-minute intervals for the two-hour serving time. The required capacity for each option is equal to 90% of the number of students in pay grades E1 through E4. If the required capacity is greater than the available capacity, the cost of the difference, the additional capacity, is computed on the basis of 20 gross square feet per person. Five percent is added to facilities cost to account for furnishings.

d. Administrative Space For Technical Training Support

(1) Space requirements are computed at 130 SF/PN net for administrative (support/detachment personnel) and 60 SF/PN net for instructors.

(2) These space requirements may be supplemented when special purpose space is required. Examples of special purpose space are auditoriums central computer rooms; break rooms, libraries, etc.

(3) Gross area for new construction is computed by multiplying all net area by a factor of 1.33 (NAVFAC P80, Facility Planning Criteria for Navy and Marine Corps Shore Installations).

e. Training Facilities

(1) Classroom Space: General-purpose classroom space is computed at 30 SF net per student. Number of classrooms and specific sizes are as negotiated between DAG training managers and the Facilities Committee.

(2) Lab and Shop Space: Lab, shop, and high bay space will be presented as negotiated between DAG training managers and the Facilities Committee.

(3) Prior to the costing DAG meeting, DAG training managers will prepare an analysis of space utilization at the current installation and a review of facility requirements from the Program of Instruction. This will be accomplished in accordance with instructions contained in the following paragraphs and the forms in Appendix B.

4. Facility Costs Distribution Between Services: The cost distributions for requirements as a result of a study are apportioned based on the type of course. Training facilities include classrooms, applied instruction facilities, labs, instructor space, administrative support space, and service detachment space.

a. Training facility costs for a consolidated course are the responsibility of the host Service except where the host is not included in the consolidation.

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- b. Training facility costs for a collocated course are the responsibility of the Service owning the training.
- c. The training facility costs for a Service unique track of a consolidated course are treated as a collocated cost.
- d. Host Service is responsible for billeting, dining, MWR and family housing facility costs.
- e. Training facilities will first be assigned to consolidated courses, second to Service unique courses, and third to collocated courses.
- f. If two or more Services have collocated training at the same site, space and costs will be prorated on the basis of AOB/ADSL.

5. Facility Analysis

a. The training managers or DAG members in accordance with the Facilities Report Form in Appendix B prior to the costing DAG meeting will complete a facilities analysis. The purpose of this analysis is to establish and document the existing training, billeting, and dining space available to support the study, and determine detailed facilities requirements necessary to conduct training being considered for consolidation or collocation. The analysis will consist of three parts:

- (1) Each gaining installation will complete the Facilities Worksheet in Appendix B.
 - (2) DAG members/training managers will identify all facilities currently used to conduct the existing training mission and any other facilities available to support the proposed training. Accurately inventory these existing facilities and provide a detailed analysis of the space utilizing the Facility Manpower Data Sheet.
 - (3) DAG members/training managers will provide a detailed analysis of space requirements for the proposed consolidated training and each Service's proposed collocated training utilizing the Facilities Report in Appendix B.
- b. The information gathered in these three steps will be provided to the Facilities Committee prior to the costing DAG to assist in the development and preparation of the facilities cost estimate.

6. Data Required by Facility Committee to Conduct Survey. Prior to the costing DAG meeting, DAG training managers will prepare an analysis of space utilization at the current installation and a review of facility requirements from the Program of Instruction. The Facilities Report Form in Appendix B provides guidance for completion of the Facilities Worksheet, the Facility Manpower Data Sheet and the Facilities Analysis Guidance forms. The aforementioned questionnaire and forms must be provided to each DAG member for completion prior to the Costing DAG.

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FACILITIES REPORT

DATE: _____

STUDY TITLE: _____

LOCATION: _____

1. OBJECTIVES

- a. Provide information and preliminary cost estimates for the consolidation and/or collocation of _____ training.
- b. Determine adequacy of facilities currently being used and their capacity to handle the increased load.
- c. Determine modification, rehabilitation, and/or new construction requirements with their associated costs.

2. SCOPE

- a. Identify academic and support requirements for the subject training using FY__ training loads.
- b. Present a general description of the academic and support facilities available for this training.
- c. Identify facility construction and/or alteration requirements.
- d. Provide cost estimates for these requirements using FY__ dollars.
- e. Normally an analysis of family housing requirements and assets is not included in the report. In most cases the off base community is fully capable of providing the necessary family housing support. In any case where adequate family housing does not exist, it is anticipated that private enterprise will respond quickly and provide for any increased demand for family housing.

3. OPTIONS

- a. Options 1
 - (1) Course 1 consolidated at XXX.
 - (2) Course 1 USXX Service unique at XXXX.
 - (3) Course 2 collocated at XXXX.
- b. Option 2
- c. Etc

4. ASSUMPTIONS

- a. It will be feasible to build additions to existing facilities, operate in separate facilities, or rearrange training such that new construction is necessary for only the additional square footage required and not the total consolidated requirement.
- b. An Environmental Assessment (EA), if required will result in a "Finding Of No Significant Impact" (FONSI).
- c. A decision will be made in sufficient time to allow the required construction to be programmed and entered into the appropriate annual funding program for accomplishment.
- d. Minor costs are associated with any change of room usage. The facility cost estimates in this report include a small dollar amount to cover the cost of any required minor modifications, such as additional electrical service in a room, change in access door configuration or other minor change to an existing space.

5. METHODOLOGY

- a. Instructional Space. All instructional space requirements, general and applied, were developed using input from Subject Matter Experts (SMEs) and reviewed by members of the Facilities Committee. Space allowance for general classrooms is 30 NSF per student. Applied space requirements were developed by SMEs based on equipment size and space needed for students and safety clearances. Consolidated training requirements were negotiated between SMEs and agreed to by each Service. The cost of training facilities includes only costs for the space required for each option.
- b. Billeting. Billeting capacities are determined using ITRO standards (APPENDIX C, Figure 1) based on DOD housing utilization standards. Also, a management factor of 1.2 is applied to the E1 through E4 students and a factor of 1.15 is applied to officers and E5 and above students. The cost of any required additional capacity is computed based on the new construction criteria in the ITRO procedures manual APPENDIX C, Figure 1.
- c. Dining. Capacities of enlisted dining facilities are based on a serving time of 120 minutes at 30-minute intervals. The required capacity for each option is equal to 90% of the number of students in pay grades E1 through E4. If the required capacity is greater than the available capacity, the cost of the difference, the additional capacity, is computed on the basis of 20 gross square feet per person.

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d. Cost Breakdown. Construction up to \$500,000 and all repairs is O&M dollars, while all construction over \$500,000 is MILCON. Cost is assigned to the various Services on the following basis:

- (1) Host pays for all consolidated training facilities, (except when host is not included in the consolidation) and all consolidated/collocated billeting and dining facilities.
- (2) Service owning training pays for collocated and Service unique training facilities.
- (3) Training facilities will be assigned first to consolidated courses, second to Service unique courses, and third to collocated courses.
- (4) If two or more Services have collocated training at the same site, any remaining excess space will be prorated on the basis of AOB/ADSL.
- (5) It should be noted that all cost assignments are estimates based on general factors, assumptions, and data provided by the Service subject matter experts. They may change when refined during implementation.

6. FACILITY COST FACTORS

a. The cost of new construction for each option site is developed by multiplying the size of the facility by 1.33 to convert net area to gross area, when appropriate, then by the budget unit cost and the assigned area cost factor. The cost of alteration is computed at 30% of new construction for minor alteration or 60% of new construction for major alteration. The cost of minor modification is computed at \$10/SF times the area to be modified times the area cost factor.

b. While cost estimates in this report are preliminary, they do provide an accurate order of magnitude cost of each option. The following facility cost factors were used.

?? Facility Base Unit Cost from DOD FY96 Cost Guide (Latest Available)

?? Supporting Facilities Factor = 1.20

?? Contingency Factor = 1.05

?? Supervision/Inspection/Overhead Factor = 1.06

c. Using the above factors, the base unit cost for new construction is converted to budget unit cost as follows.

TRAINING FACILITIES =

$\$100.00/\text{GSF} \times 1.20 \times 1.05 \times 1.06 = \$133.56/\text{GSF}$

Plus 5% for furniture = \$140.24/GSF

say \$140/GSF

BILLETING FACILITIES =

$\$94.00/\text{GSF} \times 1.20 \times 1.05 \times 1.06 = 125.55/\text{GSF}$

Use 212GSF/SPACE $\times \$125.55/\text{GSF} = \$25,110.00/\text{SPACE}$

Plus 10% for furniture = \$27,621.00/SPACE

say \$27,600/SPACE

DINING FACILITIES =

$\$147.00/\text{GSF} \times 1.20 \times 1.05 \times 1.06 = \$196.33/\text{GSF}$

Use 20GSF/PN $\times \$196.33/\text{GSF} = \$3926.60/\text{PN}$

Plus 5% for furniture = \$4122.93/PN

say \$4100/PN

d. The area cost factor for each site is as follows:

?? Ft Gordon GA = 0.86

?? Keesler AFB MS = 0.89

?? Norfolk VA = 0.92

7. FACILITY REQUIREMENTS AND COST COMPUTATIONS BY OPTION. (When report is complete delete lines that are not applicable.)

FIGURE 8-2, Facilities Report

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Chapter 9

COST ANALYSIS PROCEDURES AND GUIDELINES

1. **Cost Analysis Committee.** The Mission of the Cost Analysis Committee is to provide cost support to the Detailed Analysis Group (DAG). Members of this committee are:

Air Force (Chairman)	HQ AETC/FMAT 1851 First Street East Suite 1 Randolph AFB, TX 78150-4315 DSN 487-3550
Army—Non-Medical	HQ TRADOC ATTN: ATRM-P 5 North Gate Road, Bldg 5F Fort Monroe, VA 23651-1048 DSN 680-2341/4242
Army—Medical	AMEDDC&S (MCCS-R) 2250 Stanley Road Fort Sam Houston, TX 78234 DSN 471-7348
Navy—Non-Medical	Chief of Naval Education and Training (ETE43) 250 Dallas Street Pensacola, FL 32508-5100 DSN 922-4038
Navy—Medical	BUMED-55 2300 E Street NW Washington, DC 20372 DSN 762-3820
Marine Corps	CG TECOM C464 2008 Elliot Road Quantico, VA 22134-5029 DSN 278-3451
Training Resource Coordinator	Headquarters Air Education and Training Command (DOZ) 2 "F" Street, Suite 2 Randolph AFB, TX 78150-4325 DSN 487-6363 Comm (210) 652-6363

2. **Service Cost Analyst Instructions.** The following paragraphs will assist the analyst in preparing and documenting the ITRO Cost Analysis (to be completed by Service Cost Analyst).

a. **Background.** The ITRO EXCEL model used in cost analysis simplifies the complex process of analyzing the myriad of cost impacts in the decision making process. The model uses an incremental/decremental cost approach. The model defines the current training costs, the baseline, as the costs associated with the future production level just before the ITRO driven change. Using the model, we measure the additional costs or savings for the proposed training and compute an incremental/decremental cost impact. Prior to this model, all data was manually calculated and compiled on worksheets. The model is well designed and easy to operate. There are, however, some points that should be considered when completing the sheets. This section will attempt to bring these into focus and, hopefully, remove any confusion in completing the cost data sheet. Starting at page 9-8 and continuing through 9-21, a partial example of a cost analysis report (Figure 9-1 through Figure 9-3) and a completed cost data sheet as well as enclosures and exhibits is illustrated. The report does not include an equipment purchase list and only

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includes Army sheets for one option. A complete report would include sheets for all services and all options. You may want to make reference to it while going through the process.

b. Step-by-Step Process

(1) Before beginning a cost data sheet, you must determine whether you are host or non-host for the option under consideration. Host sheets provide for incoming population changes and non-host sheets recognize departing population changes. We will discuss the steps for a host sheet and make comments for non-host exceptions.

(2) Source data for the cost data sheet comes from several documents. The Cost Analysis Data Requirements Form or Twelve Question Form (ITRO Form 7) submitted by the service representatives provides most of the data. Additional data comes from Course Data (page 9-17), Student Travel (page 9-18), Surveillance and Implementation Travel (page 9-19), and Travel Information (page 9-20), Equipment Lists for Transfer, Equipment Purchase Lists, Transportation Cost Letters, and other miscellaneous documentation exhibits as required.

(3) The following is a step-by-step journey through the cost data sheet. When you open the cost data sheet (either Host or Non-host Excel file), you will notice several worksheets whose contents are indicated by the names on the tabs at the bottom of each. Your will initially be working with the "Draft Cost Sheet". While running the model, you will notice all cells requiring input are indicated in blue font on the computer screen. Cells whose font is not blue indicate that the information is either imported from another worksheet or contains an automatic calculation. These cells have been protected to prevent accidental over-typing. We will discuss the steps for a host sheet and make comments for non-host exceptions.

PART I - COURSE DATA

Note: Paragraph numbers below refer to the numbering used in the cost model. Reference to "enclosures" and "exhibits" refers to enclosures and exhibits in the cost model itself, not this manual.

Begin by editing cell E2 to enter the option number and cell I2 to enter the date corresponding to the last day of the study.

1. No entry required.

2. Enter the study title. Also enter the proposed action, e.g., "Consolidate Army and Air Force Communications Training at Fort Gordon". Paragraph 2 also references Enclosure 1, which contains the course data (see 9-17). Before proceeding, you should complete Enclosure I using the information provided in the Twelve Question Form or by the subject matter expert. To access Enclosure 1, click on the worksheet scroll bar at the bottom left of the screen until the Enclosure 1 worksheet comes into view. Click on the worksheet tab to select it and then enter the required course data. Note: Student input is also known as throughput. It is not average daily student load (ADSL). It is the annual number of personnel entering the classroom. Also, to compensate for the lost administrative time when converting from Service peculiar training week computation to ITRO, add 0.1 weeks administrative time for each training week to a maximum of 0.4 weeks (i.e., a 3-week course will be increased by 0.3). Army and Marines will add administrative time only to the proposed course length. Air Force and Navy will add the value to the baseline and proposed course lengths. The cost analyst should ensure the manpower analyst has included this addition in the course lengths and student load calculations provided for the costing effort. Note that consolidated courses and colocated courses are entered on different sections of the Course Data worksheet.

3. Enter current location of training (i.e., the site of the training in the study target year should ITRO not happen).

4. Enter proposed location of training.

5. No entry required, but ensure the Inflation Factors Worksheet is updated with the most current inflation factors. Inflation factors are available on the web at www.dtic.mil/comptroller. This gets you into the DOD Comptroller homepage where you should select "Defense Budget", and at the next page select "National Defense Budget for FY XXXX (Green Book)". The factors are in Table 5-9 of this document. Once the Inflation Factors Worksheet is completed, the consolidation year in the cost data sheet is imported automatically.

6. No entry required.

7. No entry required. Values are pulled directly from Enclosure 1.

8. No entry required. Values are pulled directly from Enclosure 1.

9. Input percent PCS/TDY enroute students from the 12 Question Form in 9a, i.e., 10 percent entered as 10. The TDY and return percentage is automatically computed in 9b. PCS/TDY en route percentage represents the percentage of annual trainees coming directly out of basic training.

10. Enter average student grade from the 12 Question Form. This is the average grade that will be used on line 17a(1) to calculate increased/decreased student pay resulting from a change in ADSL between the current and proposed training course.

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11. No entry required. Reserved for future use.

PART II - INCREMENTAL COST DATA

12. Permanent Party Delta - Incremental manpower data is taken from the manpower worksheets. It is the difference (delta) between the "proposed" and "current" lines on the sheet and is provided by the manpower analyst. These incremental changes are only for the service preparing the sheet. Other service changes are reflected on their sheets. Enter the military/civilian incremental changes for service preparing the sheet in subparagraphs a, b, c, and d.

a. Avg Salary - Taken from OSD Military Composite Standard Pay and Reimbursement Rates available on the web at www.dtic.mil/comptroller/rates. They include the normal PCS rotation costs, are service specific, and vary slightly by grade. The average represents the rate for the mix of grades reflected in each category above. It is always a positive number. This section relates directly to 12a-d. Enter the average salary for military and civilian personnel changes identified on the manpower sheets. For BOS personnel (line c), use the composite salary rate for an E-5/GS-5.

b. BOS NP Var cost Factor - Factor provided by service. It represents costs in BOS other than personnel to support one man-year. When entered, the spreadsheet automatically multiplies the factor by the population change to produce the increase/decrease in nonpersonnel BOS funding resulting from the population change. For the host service, the cost is derived by taking the total incoming population from other services, adding the incremental population and student load changes for the host service, and multiplying by the BOS NP Var Factor. For the non-host service, taking the total outgoing personnel times the BOS NP Var Factor derives the cost.

c. Msn NP Var Cost Factor - Factor provided by service. It represents direct mission costs for one student load.

d. Personnel Cost - Automatically calculated, no entry required. This section takes the product of the permanent party deltas (entered in 12a-d) and the average salaries to give the incremental cost or savings for manpower.

e. Incoming/Departing Personnel - For non-host sheets, use the "current" line from your service's manpower worksheets as departing personnel. It will have changes for overhead, instructors, and detachment personnel. For host sheets, use the "total proposed" line from the other services' manpower worksheets as incoming personnel. Incoming personnel are provided by your service counterparts by exchanging BOS Population Change sheets (Page 9-21). Base population change sheets are prepared by service cost analysts transferring training to a host service. This section of the cost data sheet shows by service the total "proposed" personnel relocating to the host base as a result of the training consolidation. The top section is fed by the matrix below it, which is completed to show the positions by service and classification. Consolidated and collocated student loads have to be entered separately since mission cost for collocated student loads is not transferred to the host.

13. Non-Personnel O&M Cost/(Savings) - Automatically calculated, no input required. Computation varies whether working with a host or non-host change. For mission costs on host sheets for all services, the model takes the incoming consolidated student load plus the host student load change times the school mission factor. For mission costs on non-host sheets for each service, the model takes the departing consolidated student load times the school mission factor to compute the recurring cost savings. For BOS costs on non-host sheets for each service, the model takes the total departing personnel times the BOS factor. For BOS costs on host sheets for all services except Army, the model takes the total incoming personnel plus the host incremental personnel and student load changes minus the BOS incremental personnel change times the BOS factor. The BOS incremental personnel change is removed because non-Army BOS factors are mission population driven. Army sheets do not make this adjustment since the Army factor is total population driven.

14. Equipment Cost/(Savings) - Data is taken from the twelve-question sheet (ITRO Form 6). All entries must be documented. For instance, equipment purchase must have an exhibit attached showing items and quantity with price, transfer costs must have shipping list and cost estimate from the service's transportation office or other source, and maintenance cost must show source of contractual information. We must be careful with mission costs. If it is organic (in house) it should be captured in the manpower analysis. Discuss with the manpower analyst before adding in any cost. If it is contractual it may already be in the mission cost factor. Cost analyst should get a breakout of elements in their mission factor to determine if contract maintenance has been included. Rules for who pays are contained in this procedures manual. Generally for equipment used in consolidated courses, the cost is prorated to the services based on ADSL unless the equipment is for a service unique track. Participating service pays for collocated and consolidated service unique requirement. Participating service ships their available equipment at their cost regardless of consolidated or collocated status.

15. Facility Cost/(Savings) - This information is provided by the facilities analysts.

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16. Travel Cost/(Savings)

a. The student travel costs are imported from Exhibit 1. Access Exhibit 1 by scrolling through the worksheets until you can select the correct sheet. The number of students is automatically imported from Enclosure 1. You must update or verify the students' originating locations and, using the Twelve Question Form, enter the percentage of students from each listed location. Beginning in cell N32 enter the airfare for the before ITRO city pairs listed. Do the same for the after ITRO city pairs beginning in cell N48. The spreadsheet then calculates the before ITRO travel costs, after ITRO travel costs, and the difference between the two. These costs are automatically transferred to the cost data sheet. In most cases, we compute student travel only for pipeline students meaning we cost travel from basic training to initial skills training. In some cases when the information is available, the analyst may want to capture the incremental cost of the difference in travel cost for TDY students. However, if all service analysts do not have access to TDY point-of-departure information, then we do not normally include any TDY cost information because it will unbalance the results of the cost analysis. However, if there is a significant difference in lodging and per diem costs, you may build an exhibit to recognize this difference while disregarding any difference in travel costs. When a course length, due to an interservice action, exceeds 19 weeks and becomes a PCS, capture the full PCS cost as an incremental increase in MILPERS and the previous full TDY per diem cost as a cost savings in O&M.

b. Exhibit 2 documents staff implementation and surveillance travel. We take the basic trip data from the Twelve Question Form. Note: The formula used to compute the travel cost (Cell I18) assumes that one vehicle will be rented for 4 or less travelers from the same organization. It allows for two vehicles when 5 or more travelers are involved. If this is incorrect, you must adjust the formula to reflect your actual situation. Examples of exhibits 1 and 2 are provided in this manual at pages 9-18 and 9-19. In addition, prior to completing exhibits 1 and 2, the host Service will have to complete Exhibit 3 9-20 which details the scheduled airline ticket office airfares for proposed student travel, and for staff surveillance and implementation travel routes. The host service analyst will provide this information to the other cost analysts.

c. PCS costs are also included in this paragraph. In the upper right section of page 2 of the cost data sheet we record the instructor/staff personnel moving. To determine this, take the higher of the proposed or baseline from the manpower worksheets. This is an arbitrary assumption but conservatively reflects the worse case scenario. Each Service will enter their unique PCS rates in this section. The model computes incremental moves as 67 percent for military and 75 percent for civilian. The assumption is that military and civilians normally move once every 3 or 4 years respectively. Total cost are automatically calculated and placed in the appropriate cells.

17. Other Cost/(Savings) - This section documents cost/(savings) not specifically identified in other areas. The impact of student course length change is computed by multiplying the student load change computed on the previous page by the pay rate for that average student grade from the military composite pay tables that you must enter in cell K96. Training of instructors is included as an incremental cost when it is strictly driven by the ITRO decision. Curriculum development is included when it is excluded in the manpower standard. It is seldom used. Civilian reduction-in-force (RIF) costs may be included when determinable. It too is seldom included.

18. Cost Avoidance's - To understand cost avoidance's, the cost analyst must also understand the concept of sunk costs.

a. **Sunk Costs.** Careful consideration must be given to determining which expenditures should be classified as sunk costs. Sunk costs have already been incurred as the result of past decisions. Sunk costs have been irrevocably committed to a project or program and, therefore, are beyond the reach of the decision maker. By definition, they have no bearing on or relevance to future decisions. An example given in a service directive on economic analysis is as follows. If \$1M has been spent in research and development leading to item A, with competition of the new product requiring the investment of an additional \$500K, and item B is proposed as an alternative that will require an investment of \$750K, the relevant cost comparison is \$500K versus \$750K, not \$1.5M versus \$750K.

b. **Cost Avoidance.** Guidelines for treatment of cost avoidance's must be carefully and rigorously applied. A cost avoidance is realized when a cost that would be incurred in the normal course of events is avoided by the taking of a management action (usually facilities or equipment procurements). The following criteria should be applied:

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- (1) *The item must be programmed at the service level and not merely a wish list item.*
- (2) *The avoidance of cost must be clearly linked to the management action.*
- (3) *The resource in question must not meet the criteria for a sunk cost. Even though an item is programmed, if it is "within the reach of the decision maker" and therefore can be avoided, it is not a sunk cost and can be considered for treatment as avoidance. As an example, assume training at Ft Leonard Wood is being considered for consolidation at Lackland AFB. The Army has programmed a facility project for the current training in the amount of \$8.5M. The project has not been placed out for bid and no contract award has been made. It is still possible to kill the proposed solicitation for bids. In the option to move to Lackland, the Army would record a cost avoidance of \$8.5M. Conversely, had the project already been awarded it would have been considered a sunk cost.*

19. Comments/Footnotes This section gives an opportunity to make reference to unusual items or comment on data sources not covered in the exhibits or enclosures. For instance, we can use this section to identify the different grades and numbers of personnel in the manpower section, uninflated values for BOS and mission factors, etc. It is not necessary to footnote items already documented in other parts of the cost analysis.
20. Name and Telephone Number of Project Officer(s) Preparing Data List those individuals responsible for providing and verifying data used in the four categories of Course, Manpower, Facilities, and Cost. Once you have completed the cost data worksheet, save it using the following filename convention: OPTION<<option #>> - <<service abbreviation>>.xls. For example, the cost data sheet for Army option 1 would be saved as OPTION1-AR.XLS, and for Navy option 3 would be saved as OPTION3-NV.XLS. Note: Once the cost data sheet is filled in, other reports are automatically generated. These include: Inflated Cost Sheet (pages 9-8 & 9-9), Summary Report (page 9-10), and for the host service only, a Fair Share of Recurring O&M (page 9-15) and Fair Share of One-Time O&M Report (page 9-16). The host service analyst should scroll over to the O&M Fair Share worksheet to ensure it captures all the recurring O&M cost contained in the study. If a category of O&M cost is not included, but should be, modify the report (recurring O&M begins in cell A1 and one-time O&M begins in cell A67) to capture these costs. For example, if there are no school overhead costs, but there are equipment maintenance costs, change school overhead to equipment maintenance and adjust the formula in cell G41 to reference the correct cell for maintenance costs in the cost data sheet—Reviewing the Cost Data and Service Summary Sheets
- a. To print the draft cost data sheet, the sheet must be active (that is, you must be in the draft cost worksheet). Invoke the print macros by selecting "tools", "macro", and then "macros". A list of macros will appear. Select "Print Cost Sheet" and press "run". Repeat the same procedures to print the summary sheet, which resides on the same worksheet as the cost data and is built automatically. To print an enclosure or exhibit, first make the enclosure or exhibit worksheet active and follow the above procedures for invoking the print macros. Cross check population changes entered on the cost data sheets between host and participating service with the other cost analysts. Incoming personnel should equal departing personnel by service after considering participating Service incremental staff and student load changes. Exchange cost data sheets with other cost analyst and do a quality check of the sheets. Make any needed changes. Brief your subject matter experts with these documents to insure all pertinent information has been entered.
 - b. Make any corrections before printing the final inflated cost data sheets. Verify with the other cost analyst that the inflation factors and years are correct. Make the "Inflated Cost Sheet" active by selecting it and print the cost sheet and final summary using the macro procedures described in paragraph 1, above. Also print the O&M Fair Share worksheet (host only) and final versions (as necessary) of Enclosure 1, Exhibit 1, Exhibit 2, Exhibit 3 and any other attachments you may have developed.

4. Completing the Cost Summary

- c. The host service coster is responsible for performing the cost roll up. Obtain option files from other services' cost analysts and load all files into a summary directory on host computer. Retrieve host file corresponding to the option being summed. Select the worksheet that matches the number of services involved in the study. NOTE: The host data is automatically copied into the first section of the summary worksheet. Next, begin copying the summary data from each participating service's option sheet onto the summary worksheet. To do this, open the participating service's option file and select the "Inflated Cost Sheet". Scroll over to the summary section and highlight the summary data indicated by the yellow shading (cells S8 through U64). Click on the copy icon on the tool bar or select "edit" then "copy". Now click on "Window" on the menu bar and select the host file. This will return you to the summary worksheet. Place the cursor on top left most cell in the yellow highlighted section under "Participating Service" (cell J13) and select

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“Edit”, “Paste Special” and click “Values”. This will convert the formulas to values and place them in the appropriate cells under the host column. Now repeat this same procedure for the remaining participating services.

d. Once you have finished pasting in the summary data for each participating service, the option payback (page 9-11) is automatically calculated and placed in a report format beginning in cell A73. Also, a MOA attachment (page 9-14) showing transfer amount is generated beginning in cell AD1. Recommend you now save the file using a name such as OPT1SUM.XLS indicating a summary for option 1 across all services. To do this, select “File”, “Save As” and then type in the appropriate name for the summary file. After saving the file, close the individual services’ worksheets before running the print macros to print the SUMMARY, PAYBACK, and MOA ATTACHMENT.

e. After all the summaries have been generated for all options, there is one more step required before finishing the report. Using OPT1SUM, copy the payback line (A85 through R85) from each of the other option summaries and paste them as values onto the payback report for option 1 beginning at cell A86. After printing this consolidated payback report encompassing all options, you can begin assembling the report for presentation to the DAG.

5. Assembling the Report

a. Prepare a short narrative of procedures used and any conclusions reached for the cost analysis and include as an introduction to the Cost Analysis Report.

b. Attach the following documents to the narrative in the listed order.

(1) Cost Summary by Option or Payback Report (page 9-11)

(2) Cost Summary by Service (page 9-12)

(3) Interservice Operations and Maintenance Summary or MOA Attachment (page 9-14)

(4) Fair Share of recurring and one-time O&M (pages 9-15 and 9-16)

(5) Cost summaries (page 9-10), Cost Data Sheets (page 9-8 & 9-9), Enclosures, Exhibits, and Miscellaneous Documentation by Service (equipment lists, transfer documents, equipment purchase documents, contract maintenance documents, etc.

6. Check with DAG chairperson and make the desired number of copies.

7. Final brief the DAG.

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USE for HOST ONLY

Last Updated
30 Apr 98

PART I - Course Data

OPTION 8A

Army

1. Service Preparing Data:
2. Study Title: Civil/Construction Engineer Training
- Proposed Action: Consolidate Equip Operator & Tech Engineer Training at Fort Leonard Wood, MO
3. Current Location: Fort Leonard Wood, MO
4. Proposed Location: Fort Leonard Wood, MO

5. Proposed Date for Consolidation/Collocation: 1st Qtr FY 96

Courses or Categories of Courses

6. Course Length (Training Weeks/Days)*:

	<u>Consolidated</u>	<u>Collocated</u>
a. Before Consolidation/Collocation	See Enclosure 1	See Enclosure 1
b. After Consolidation/Collocation	See Enclosure 1	See Enclosure 1

* One day = 0.2 weeks

7. Student Input/Entries as of => FY 95

a. Before Consolidation/Collocation	3323	0
b. After Consolidation/Collocation	3323	0
8. Student Load or Average Daily Load: (Crse length in tng wks (or days) X student input/50 wks (or 246 days))

a. Before Consolidation/Collocation	558.9	0.0
b. After Consolidation/Collocation	549.3	0.0
Delta Change in Load	-9.6	0.0

Total Student Load Change
-10 (Used in 17a(1) below)

9. Student Status by Category: Enter as a decimal

a. % PCS/TDY enroute	90%	100%
b. % TDY & return	10%	0%
10. Student Grade (Average)

E1	E2
----	----
11. Attrition Rate - Enter as a decimal.

NA

PART II - Incremental Cost Data

(Inflated) FY 96 Dollars

	-----PERMANENT PARTY DELTA-----			-----PERSONNEL COST-----		
	Mil	Civ	Total	Mil	Civ	Total
12. Personnel Requirement						
a. Instructors/Super	(12)	0	(12)	(548,743)	0	(548,743)
b. Sch, Dept, Br OH	(4)	4	0	(144,266)	139,984	(4,282)
c. BOS	5	14	19	182,506	446,238	628,744
d. Detachment Unit	0	0	0	0	0	0
e. Total	(11)	18	7	(\$510,503)	\$586,221	\$75,718

Avg Salary -	Mil	Civ	
Line a.	45,729	0	
Line b.	36,067	34,996	
Line c.	36,501	31,874	
Line d.	0	0	

BOS NP Var Cost Factor = 1,335
Msn NP Var Cost Factor = 448

13. Non-Personnel O&M Cost/(Savings)

Exclude equipment contract maintenance in item 14.		Variable	
		Factors	Recurring Cost
a. School Mission (Stud Load Chg)	326	448	145,945
b. Base Opns Spt (Pop Chg)	538	1335	718,144
		Total	\$864,089

MAKE NOTES IN SECTION 19 AS NECESSARY

14. Equipment Cost/(Savings)

a. Procurement	- O&M \$	108,781	0	
	- Procurement \$	28,624	0	
b. Maintenance (Costs not included in MSN or BOS factors)				
(1) Contract			7,188	
(2) In-House			0	
c. Operation		0	0	
d. Transfer (include packing & shipping cost)		0		
e. Other (Identify in Line 19)		0	0	
		Total	\$137,405	\$7,188

15. Facility Cost/(Savings)

a. New Construction	- O&M \$	351,000		
	- MILCON \$	0		
b. Modification	- O&M \$	290,000		
	- MILCON \$	0		
c. Repair & Maintenance		0	0	
d. Other (Identify in Line 19)		0	0	
		Total	\$641,000	\$0

-- Continued on next page --

INCOMING PERSONNEL				
336	Consolidated Student Load			
59	Collocated Student Load			
98	Instructor Personnel			
23	Detachment Personnel			
25	Overhead Personnel			
0	(Add other incoming pers)			
0				
541	Population Change (BOS)			

* INPUT Breakout of Incoming Personnel				
	<i>HOST</i>	<i>PARTICIPANTS</i>		
	<u>USA</u>	<u>USAF</u>	<u>USN</u>	<u>USMC</u>
Student Load				
Consol -	0	119	73	144
Colloc -	0	29	0	30
Instructor -	0	39	19	40
Detachment -	0	5	7	11
Overhead -	0	6	2	17
(Other)	0	0	0	0
(Other)	0	0	0	0
TOTALS	0	198	101	242

Army

OPTION 8A

Army

Consolidate Equip Operator & Tech Engineer Training at Fort Leonard Wood, MO

20. Name and Telephone Number of Project Officer(s) Preparing Data:

a. Course Data:	Mr. John Newcomber, U.S. Army Engineer School, DSN 676-4111
b. Manpower Data:	Mr. Steve Colclasure, HQ TRADOC, Fort Monroe, VA, DSN 680-5005
c. Facilities Data:	Mr. Jim Shamblen, HQ TRADOC, Office of the Engineer, DSN 680-2554
d. Cost Data:	Mr. Tom West, HQ TRADOC, Program, Analysis, & Evaluation, DSN 680-4451

OPTION 8A

9-8

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

COST SUMMARY

Last Updated

30 Apr 98

() Indicates Savings

OPTION 8A

Army

Consolidate Equip Operator & Tech Engineer Training at Fort Leonard Wood, MO

Extract>>		Army	OPTION 8A
		FY 96	Dollars
			Annual
CATEGORY		One-Time	Recurring
PERSONNEL: 1/			
	Military		(\$510,503)
	Civilian		\$586,221
	Subtotal	\$0	\$75,718
MATERIALS/SERVICES:			
	School/Course		\$145,945
	Base Opns		\$718,144
	Subtotal	\$0	\$864,089
EQUIPMENT:			
	Procurement - O&M \$	\$108,781	\$0
	- Procurement \$	\$28,624	\$0
	Maintenance		\$7,188
	Operation	\$0	\$0
	Transfer	\$0	
	Other	\$0	\$0
	Subtotal	\$137,405	\$7,188
FACILITY:			
	New Construction-O&M \$	\$351,000	
	MILCON \$	\$0	
	Modification - O&M\$	\$290,000	
	- MILCON \$	\$0	
	Repair/Maintenance	\$0	\$0
	Other	\$0	\$0
	Subtotal	\$641,000	\$0
TRAVEL:			
TDY	Implementation	\$0	
	Surveillance		\$0
	Student - O&M \$		\$0
PCS			
	Staff - Civ - O&M \$	\$0	
	- Mil - MILPER \$	\$0	
	Student - MILPER \$		\$0
	Subtotal	\$0	\$0
STUDENT PAY & ALWS			\$0
OTHER (excl stud pay & alws)		\$0	\$0
COST AVOIDANCE:			
	Facilities - O&M \$	\$0	
	- MILCON \$	\$0	
	Equipment - O&M \$	\$0	
	- Procurement \$	\$0	
	Other	\$0	\$0
	Subtotal	\$0	\$0
TOTAL:		\$778,405	\$946,995

1/Includes all staff personnel - not students

FIGURE 9-2, Cost Summary

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

Last Updated
30 Apr 98

COST SUMMARY BY OPTION

STUDY TITLE: Civil/Construction Engineer Training

() Indicates Savings

	FY	96	Dollars	
	DOD One-Time	DOD Annual Recurring	Payback Period (in Years)	Option Description
OPTION 8A	\$2,222,169	\$372,171	NONE	Consolidate Equip Operator & Tech Engineer Training at Fort Leonard Wood, MO

FIGURE 9-3, Cost Summary Sheet (By Option)

INTERSERVICE TRAINING REVIEW ORGANIZATION

PROCEDURES MANUAL COST SUMMARY BY SERVICE

Last Updated
30 Apr 98

STUDY TITLE: *Civil/Construction Engineer Training*

() Indicates Savings

OPTION 8A DESCRIPTION: *Consolidate Equip Operator & Tech Engineer Training at Fort Leonard Wood, MO*

CATEGORY	Host Service			Participating Service			Participating Service			Participating Service			Grand Total All Services		
	Army		OPTION 8A FY 96 Dollars Annual Recurring	Air Force		OPTION 8A FY 96 Dollars Annual Recurring	Navy		OPTION 8A FY 96 Dollars Annual Recurring	Marine Corps		OPTION 8A FY 96 Dollars Annual Recurring	TOTAL		OPTION 8A FY 96 Dollars Annual Recurring
	One-Time			One-Time			One-Time			One-Time			One-Time		
PERSONNEL: 1/															
Military			(\$510,503)			\$428,785			\$188,568			(\$132,890)			(\$26,040)
Civilian			\$586,221			(\$64,585)			(\$127,501)			(\$278,567)			\$115,569
SUBTOTAL	\$0		\$75,718	\$0		\$364,200	\$0		\$61,067	\$0		(\$411,456)	\$0		\$89,529
MATERIALS/SERVICES:															
School/Course			\$145,945			(\$485,235)			(\$87,789)			(\$210,823)			(\$637,902)
Base Opns			\$718,144			(\$198,925)			(\$68,949)			(\$206,954)			\$243,317
SUBTOTAL	\$0		\$864,089	\$0		(\$684,160)	\$0		(\$156,738)	\$0		(\$417,776)	\$0		(\$394,585)
EQUIPMENT:															
Procurement-O&M \$	\$108,781		\$0	\$37,581		\$0	\$0		\$0	\$190,985		\$0	\$337,347		\$0
- Procurement \$	\$28,624		\$0	\$0		\$0	\$0		\$0	\$0		\$0	\$28,624		\$0
Maintenance			\$7,188			\$0			\$0			\$0			\$7,188
Operation	\$0		\$0	\$0		\$0	\$0		\$0	\$0		\$0	\$0		\$0
Transfer	\$0			\$48,054			\$58,576			\$246,945			\$353,575		
Other	\$0		\$0	\$0		\$0	\$0		\$0	\$0		\$0	\$0		\$0
SUBTOTAL	\$137,405		\$7,188	\$85,635		\$0	\$58,576		\$0	\$437,930		\$0	\$719,546		\$7,188
FACILITY:															
Construction-O&M \$	\$351,000			\$0			\$0			\$0			\$351,000		
- MILCON \$	\$0			\$69,000			\$0			\$0			\$69,000		
Modification- O&M \$	\$290,000			\$0			\$0			\$54,000			\$344,001		
- MILCON \$	\$0			\$100,000			\$0			\$0			\$100,000		
Repair/Maintenance	\$0		\$0	\$0		\$0	\$0		\$0	\$0		\$0	\$0		\$0
Other	\$0		\$0	\$0		\$0	\$0		\$0	\$0		\$0	\$0		\$0
SUBTOTAL	\$641,000		\$0	\$169,000		\$0	\$0		\$0	\$54,000		\$0	\$864,000		\$0
TRAVEL:															
TDY															
Implementation	\$0			\$6,931			\$20,171			\$36,829			\$63,932		
Surveillance			\$0			\$7,763			\$5,744			\$1,396			\$14,903
Student - O&M \$			\$0			\$20,562			(\$36,432)			\$42,469			\$26,600
PCS															
Staff - Civ - O&M \$	\$0			\$246,432			\$0			\$0			\$246,432		
- Mil - MILPER \$	\$0			\$98,836			\$64,974			\$164,448			\$328,259		
Student - MILPER \$			\$0			\$0			\$0			\$0			\$0
SUBTOTAL	\$0		\$0	\$352,199		\$28,324	\$85,146		(\$30,688)	\$201,278		\$43,866	\$638,623		\$41,502
STUDENT PAY & ALWS			(\$235,154)			\$642,447			\$212,027			\$0			\$619,320
OTHER (excl stud pay/alws)	\$0		\$0	\$0		\$0	\$0		\$9,217	\$0		\$0	\$0		\$9,217
COST AVOIDANCE:															

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

Facilities - O&M \$	\$0		\$0		\$0		\$0		\$0	
- MILCON \$	\$0		\$0		\$0		\$0		\$0	
Equipment - O&M \$	\$0		\$0		\$0		\$0		\$0	
- Procurement \$	\$0		\$0		\$0		\$0		\$0	
Other	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
SUBTOTAL	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL:	\$778,405	\$711,841	\$606,834	\$350,811	\$143,722	\$94,885	\$693,208	(\$785,366)	\$2,222,169	\$372,171

1/Includes all staff personnel - not students

FIGURE 9-4, Cost Summary, (By Service)

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

INTERSERVICE OPERATIONS AND MAINTENANCE SUMMARY

Last Updated
30 Apr 98

STUDY TITLE: *Civil/Construction Engineer Training*

OPTION 8A Consolidate Equip Operator & Tech Engineer Training at Fort Leonard Wood, MO

Host Service: Army

Host Location: Fort Leonard Wood, MO

Participating Services: Air Force Navy Marine Corps

FY 96 Dollars (in Thousands)

SECTION I - O&M COST/(SAVINGS)

	<i>HOST</i>	<i>*****PARTICIPATING SERVICES*****</i>			
	<u>Army</u>	<u>Air Force</u>	<u>Navy</u>	<u>Marine Corps</u>	<u>Net to DOD</u>
One-Time	\$749.8	\$339.0	\$78.7	\$528.8	\$1,696.3
Recurring	\$1,457.5	(\$720.4)	(\$305.7)	(\$652.5)	(\$221.1)
	(\$64.9)	<==Host Recurring Incremental O&M Cost/(Savings)			

SECTION II - INTERSERVICE TRANSFER AMOUNTS

	<i>TO</i>	<i>FROM</i>	<i>FROM</i>	<i>FROM</i>
	<u>Army</u>	<u>Air Force</u>	<u>Navy</u>	<u>Marine Corps</u>
O&M RECURRING	* \$1,674.6	\$609.4	\$321.6	\$743.5

The total transfer may not match the host recurring requirement shown in Section 1. The difference between the two is either savings which the host will retain or additional cost caused by changes in host requirements.

The ITRO Deputy Executive Board recommends the ITRO Executive Board approve the above Interservice Training Option and the transfer of the O&M dollars shown in Section II.

US AIR FORCE DEB MEMBER

US ARMY DEB MEMBER

US MARINE CORPS DEB MEMBER

US NAVY DEB MEMBER

FIGURE 9-5, Ops and Maintenance Summary

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

FAIRSHARE OF RECURRING O&M

Last Updated

30 Apr 98

FY 96 Dollars

HOST SERVICE: Army

OPTION 8A Consolidate Equip Operator & Tech Engineer Training at Fort Leonard Wood, MO

O&M Category	Population/ Load Changes		O&M Recurring Cost	O&M Fairshare
<i>BOS Personnel</i>	USA	(22)		(\$25,671)
	USAF	198		\$231,041
	USN	101		\$117,854
	USMC	242		\$282,384
	Total	519	\$605,608	\$605,608
<i>BOS Non-Personnel</i>	USA	(22)		(\$30,442)
	USAF	198		\$273,974
	USN	101		\$139,754
	USMC	242		\$334,857
	Total	519	\$718,144	\$718,144
<i>School Mission Non-Personnel</i>	USA	(10)		(\$4,477)
	USAF	119		\$53,274
	USN	73		\$32,681
	USMC	144		\$64,467
	Total	326	\$145,945	\$145,945
<i>School Overhead</i>	USA	(10)		(\$4,294)
	USAF	119		\$51,098
	USN	73		\$31,346
	USMC	144		\$61,833
	Total	326	\$139,984	\$139,984
			Grand Total	\$1,609,681
Fairshare Total by Service				
			Army	(\$64,884)
			Air Force	\$609,388
			Navy	\$321,636
			Marine Corps	\$743,541
			Total	\$1,609,681

FIGURE 9-6, Fair-share of Recurring O&M

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

FAIRSHARE OF ONE-TIME O&M

HOST SERVICE: Army FY 96 Dollars Last Updated 30 Apr 98

OPTION 8A Consolidate Equip Operator & Tech Engineer Training at Fort Leonard Wood, MO

O&M Category	Load Changes		O&M One-Time Cost	O&M Fairshare
<i>Equipment Procurement</i>	USA	0		\$0
	USAF	119		\$38,527
	USN	73		\$23,634
	USMC	144		\$46,621
	Total	336	\$108,781	\$108,781
<i>Equipment Operation</i>	USA	0		\$0
	USAF	119		\$0
	USN	73		\$0
	USMC	144		\$0
	Total	336	\$0	\$0
<i>New Construction</i>	USA	0		\$0
	USAF	119		\$124,313
	USN	73		\$76,259
	USMC	144		\$150,429
	Total	336	\$351,000	\$351,000
<i>Facility Modification, Repair & Maintenance</i>	USA	0		\$0
	USAF	119		\$102,708
	USN	73		\$63,006
	USMC	144		\$124,286
	Total	336	\$290,000	\$290,000

Grand Total \$749,782

Fairshare Total by Service

Army	\$0
Air Force	\$265,548
Navy	\$162,899
Marine Corps	\$321,335
Total	\$749,782

FIGURE 9-7, Fairshare of One-Time O&M

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

COURSE DATA

Last Updated
30 Apr 98

my Enclosure 1

PTION 8A Consolidate Equip Operator & Tech Engineer Training at Fort Leonard Wood, MO

TARGET YEAR FY 96

		TARGET YEAR WITHOUT ITRO			TARGET YEAR WITH ITRO		
COURSE NUMBER	COURSE TITLE	LENGTH IN WEEKS	INPUT	STUDENT LOAD	LENGTH IN WEEKS	INPUT	STUDENT LOAD
<u>CONSOLIDATED COURSES</u>							
2E	Heavy Construction Equipment Operator	7.4	951	140.7	8.46	951	160.9
2F	Crane Operator	7.1	311	44.2	6.36	311	39.6
2J	General Construction Equipment Operator	6.4	588	75.3	6.66	588	78.3
IT	Technical Equipment Specialist	19.6	208	81.5	18.6	208	77.4
IR	Interior Electrician	6.6	218	28.8	6.6	218	28.8
2B	Construction Equipment Repairer	9	1047	188.5	7.85	1047	164.4
				0.0			0.0
				0.0			0.0
	Total Consolidated		3323	558.9		3323	549.3
<u>COLLOCATED COURSES</u>							
				0.0			0.0
				0.0			0.0
				0.0			0.0
				0.0			0.0
				0.0			0.0
	Total Collocated		0	0.0		0	0.0

NOTE: Army & Marines add 0.1 wk per training week (up to a max of 0.4 wks) for administrative time to proposed (target year with ITRO) course length .
Navy and Air Force add this value to both baseline and proposed course lengths. Impacts BOS but not instructor computations.

FIGURE 9-8, Course Data

INTERSERVICE TRAINING REVIEW ORGANIZATION PROCEDURES MANUAL

Exhibit 1

Army

Last Updated

30 Apr 98

STUDENT TRAVEL

OPTION 8A

Consolidate Equip Operator & Tech Engineer Training at Fort Leonard Wood, MO

ORIGINATING LOCATIONS

CURRENT TNG SITE	NUMBER OF STUDENTS	Lackland				OTHER	TOTAL
Sheppard AFB, TX	453	56%	0%	0%	40%	44%	100%
TOTAL		254	0	0	0	199	453

FROM LOCATION	TO LOCATION	NUMBER STUDENTS	TRAVEL COST	TOTAL COST IN			DOLLARS
				FY	95	96	
LACKLAND	Sheppard AFB, TX	254	\$22		\$5,581	\$5,731	
0	Sheppard AFB, TX	0	\$0		\$0	\$0	
0	Sheppard AFB, TX	0	\$0		\$0	\$0	
0	Sheppard AFB, TX	0	\$0		\$0	\$0	
OTHER	Sheppard AFB, TX	199	\$0		\$0	\$0	
TOTAL		453	\$22		\$5,581	\$5,731	

FROM LOCATION	TO LOCATION	NUMBER STUDENTS	TRAVEL COST	TOTAL COST IN			DOLLARS
				FY	95	96	
JACKSON	Fort Leonard Wood, MO	217	\$118		\$25,606	\$26,292	
0	Fort Leonard Wood, MO	0	\$0		\$0	\$0	
0	Fort Leonard Wood, MO	0	\$0		\$0	\$0	
0	Fort Leonard Wood, MO	0	\$0		\$0	\$0	
OTHER	Fort Leonard Wood, MO	236	\$0		\$0	\$0	
TOTAL		453	\$118		\$25,606	\$26,292	
		DELTA			\$20,606	\$20,562	

Army

EXHIBIT 1

FIGURE 9-9, Student Travel Costs

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

Exhibit 2

Army

IMPLEMENTATION/SURVEILLANCE TRAVEL

Last Updated

10 Apr 98

OPTION 8A Consolidate Equip Operator & Tech Engineer Training at Fort Leonard Wood, MO

IMPLEMENTATION

Para 16b(2)

#	#	#	DAILY	DAILY	DAILY	TRANS	TOTAL TRAVEL COST IN		DOLLARS	FROM	TO
TRIPS	PEOPLE	DAYS	LODGING	MEALS	RENTAL	COST	FY	95	96		
3	3	5	\$16	\$34	\$30	\$450		\$6,750	\$6,931	Sheppard AFB, TX	Fort Leonard Wood, MO
0	2	0	\$0	\$0	\$0	\$0		\$0	\$0		
0	2	0	\$0	\$0	\$0	\$0		\$0	\$0		
0	2	0	\$0	\$0	\$0	\$0		\$0	\$0		
0	2	0	\$0	\$0	\$0	\$0		\$0	\$0		
0	2	0	\$0	\$0	\$0	\$0		\$0	\$0		
TOTAL								\$6,750	\$6,931		

SURVEILLANCE

Para 16b(3)

#	#	#	DAILY	DAILY	DAILY	TRANS	TOTAL TRAVEL COST IN		DOLLARS	FROM	TO
TRIPS	PEOPLE	DAYS	LODGING	MEALS	RENTAL	COST	FY	95	96		
4	3	3	\$16	\$34	\$30	\$450		\$7,560	\$7,763	Sheppard AFB, TX	Fort Leonard Wood, MO
0	1	0	\$0	\$0	\$0	\$0		\$0	\$0		
0	1	0	\$0	\$0	\$0	\$0		\$0	\$0		
0	1	0	\$0	\$0	\$0	\$0		\$0	\$0		
0	1	0	\$0	\$0	\$0	\$0		\$0	\$0		
0	1	0	\$0	\$0	\$0	\$0		\$0	\$0		
TOTAL								\$0	\$0		

Army

EXHIBIT 2

FIGURE 9-10, Implementation and Travel Costs

INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL

Exhibit 3

TRAVEL INFORMATION

Last Updated

30 Apr 98

ORIGINATION	DESTINATION	ONE-WAY AIR FARE
APG (Baltimore, MD)	Leonard Wood, MO	\$157
Camp Lejeune, NC	Goodfellow AFB, TX	\$241

FIGURE 9-11, Travel Information

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

BOS POPULATION CHANGE

LOSING SERVICE _____ <i>OPTION 1</i>	GAINING SERVICE _____ <i>OPTION 2</i>		
Consolidated Student Load _____	Consolidated Student Load _____		
Collocated Student Load _____	Collocated Student Load _____		
Instructor _____	Instructor _____		
Detachment _____	Detachment _____		
Overhead Staff _____	Overhead Staff _____		
<i>OPTION 3</i>	<i>OPTION 4</i>		
Consolidated Student Load _____	Consolidated Student Load _____		
Collocated Student Load _____	Collocated Student Load _____		
Instructor _____	Instructor _____		
Detachment _____	Detachment _____		
Overhead Staff _____	Overhead Staff _____		
<i>OPTION 5</i>	<i>OPTION 6</i>		
Consolidated Student Load _____	Consolidated Student Load _____		
Collocated Student Load _____	Collocated Student Load _____		
Instructor _____	Instructor _____		
Detachment _____	Detachment _____		
Overhead Staff _____	Overhead Staff _____		
<i>OPTION 7</i>	<i>OPTION 8</i>		
Consolidated Student Load _____	Consolidated Student Load _____		
Collocated Student Load _____	Collocated Student Load _____		
Instructor _____	Instructor _____		
Detachment _____	Detachment _____		
Overhead Staff _____	Overhead Staff _____		

FIGURE 9-12, BOS Population Change

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

Chapter 10

ITRO HEALTH CARE PROCESSES

1. **Purpose.** The purpose of this chapter is to provide guidance on the unique aspects of conducting Health Care studies within the Interservice Training Review Organization (ITRO) process. It is intended for use with the other portions of the ITRO Procedures Manual.
2. **Background.**
 - a. Experience in conducting ITRO Health Care studies has shown that the basic information, Rules of Engagement, and forms contained in the other sections ITRO Procedures Manual are directly applicable to the conduct of Health Care studies. However, there are several additional and unique areas for Health Care, which require specific guidance.
 - b. The main areas of difference with health care are:
 - (1) The health care chain of command within the Assistant Secretary of Defense for Health Affairs (ASD (HA))
 - (2) The decision process
 - (3) A permanent health care office (secretariat)
 - (4) Accreditation
 - c. These differences primarily result from the funding of military health care by the Defense Health Program (DHP), which is directed by ASD (HA).
3. **Line and Health Care Organizational Relationships**
 - a. The Army and the Navy Surgeons General directly control their training commands and funding, which do not come under the control of TRADOC or CNET. The Air Force, however, manages Health Care training through the Air Education and Training Command (AETC). MCCDC does not usually become involved with Health Care training, since the Navy provides their medical and dental support. The Coast Guard conducts some Health Care training, but participates in many of the military medical department courses and programs.
 - b. In 1994 a separate health care procedures manual was published to fill this deficit. However, that manual duplicated much of what was in the ITRO procedures manual. This version of the health care guidance is intended to eliminate that redundancy and to more clearly show that health care is an integral part of the fundamental ITRO process.

ORGANIZATION AND RESPONSIBILITIES

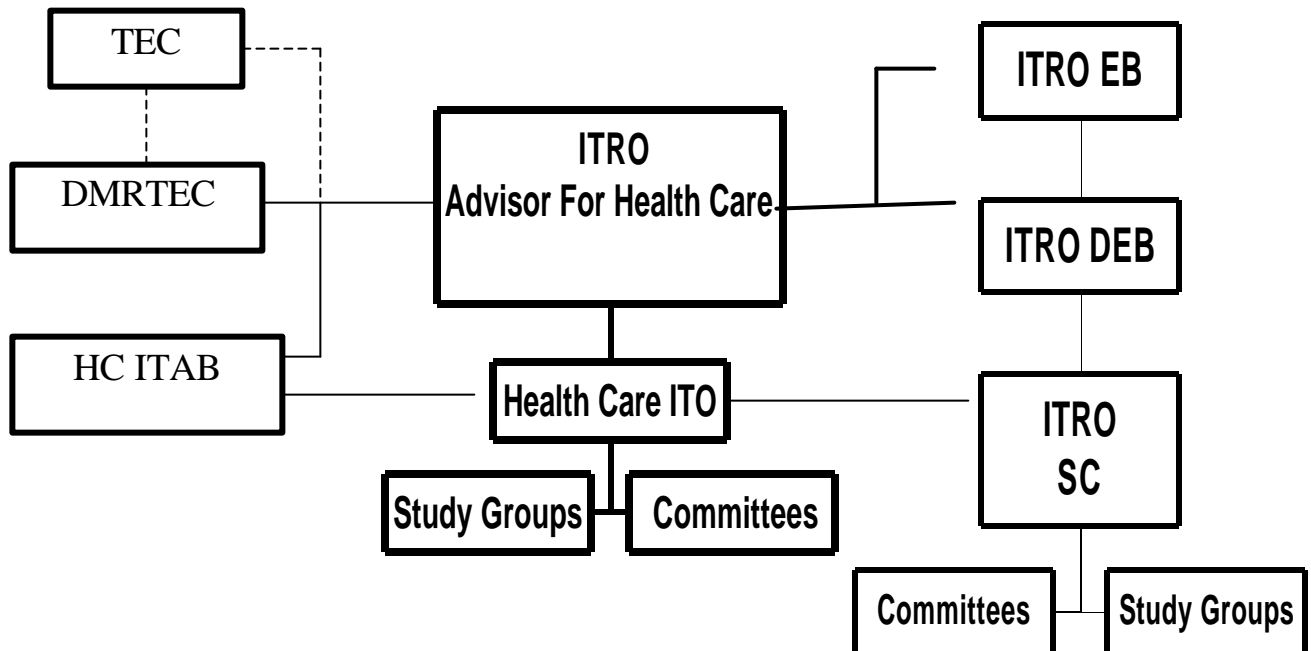


Figure 10-1, Health Care Organizational Relationships within ITRO

**INTERSERVICE TRAINING REVIEW ORGANIZATION
PROCEDURES MANUAL**

1. **Interservice Training Review Organization (ITRO).** The interservice training review process for Health Care is guided by and achieved through a structure of boards and committees (see Figure 1). The organization is adapted to accommodate the Military Health System and a permanent Health Care Interservice Training Office (HC ITO), while maintaining full membership and participation with all ITRO committees and boards. The following paragraphs describe and outline the responsibilities of those Health Care boards and committees. Unless noted otherwise HC follows all ITRO procedures.
2. **Tricare Executive Committee (TEC).**...The TEC functions as an executive level discussion and advisory group chaired by the Principal Deputy Assistant Secretary (Health Affairs). The members include the Surgeons General from the Army, Navy, and Air Force, the Executive Director of the Tricare Management Activity and the J-4 Medical Readiness Director.
3. **Defense Medical Readiness Training and Education Council (DMRTEC).** The DMRTEC is the authority for Health Care training decisions and the primary source of guidance and direction.
 - a. The ASD (HA) charts the DMRTEC and approves the minutes of the meetings, which are considered to be ITRO Executive Orders for all Health Care decisions made by the DMRTEC.
 - b. DASD, Health Operations Policy (DASD (HOP)) chairs the DMRTEC. Each Service is represented by a Flag officer from their Surgeon's General office. There are also representatives from the Reserve components, J-4, and USUHS. The ITRO Advisor for Health Care is a voting member of the DMRTEC. DMRTEC keeps the TEC informed on all Health Care interservice training issues and decisions.
- a. **ITRO Steering Committee (SC), Deputy Executive Board (DEB) and Executive Board (EB).** Health Care participates as a full member in the ITRO SC, DEB, and EB for all procedural and regulatory issues.
4. **ITRO Advisor for Health Care (ITRO AHC).** The ITRO AHC is the principal advisor and advocate for health care interservice training within the Military Health System and within ITRO. A Naval medical department Flag Officer will be assigned as the ITRO AHC. The ITRO AHC shall:
 - (1) Represent the position of all Services on interservice health care training issues to the DMRTEC and the TEC.
 - (2) Serve as a voting member of the DMRTEC for interservice training.
 - (3) Advise the ITRO EB and DEB on health care interservice training matters.
 - (4) Chair the Health Care Interservice Training Advisory Board (HC ITAB).
 - (5) Provides direction to the Health Care Interservice Training Office (HC ITO).
5. **Director, Health Care Interservice Training Office.** The Director will:
 - a. Serve as the manager of the Health Care Interservice Training Office and direct the daily activities of the staff.
 - b. Serve as the principal advisor to the ITRO AHC on health care interservice training.
 - c. Represent the ITRO AHC in his/her absence in all matters pertaining to health care interservice training.
 - d. Keep the ITRO AHC informed of HC ITAB recommendations, issues, and agreements.
 - e. Coordinate the activities and provide guidance to the HC ITAB, Detailed Analysis Groups, Quick Look Groups, Standing Committees, and other groups.
 - f. Coordinate with the HC ITAB Service voting representatives on membership for DAGs, QLGs, Standing Committees, or other groups.
 - g. Provide the professional direction, expertise, and guidance required to accomplish the goals of the HC interservice training.
 - h. Provide briefings, reports, and information to appropriate authorities, such as Congress, ASD (HA), the Surgeons General, and ITRO boards and committees.
 - i. Serve as a member of the ITRO Steering Committee.
 - j. Serve as the ITRO AHCs principal interservice liaison with the Community College of the Air Force (CCAF).
 - k. Serve as the DOD Commissioner to the Council on Accreditation of Allied Health Education Programs (CAAHEP).
6. **Health Care Interservice Training Office (HC ITO).** The HC ITO will serve as a facilitating and staffing support office to the ITRO AHC and HC ITAB. The HC ITO will:
 - a. Be permanently supported by the Navy medical department and not rotate among the Services.
 - b. Be staffed by a member of each Service's medical department and a civilian Program Analyst (GS-343).

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- c. Serve as the points of contact on health care interservice training for all military services, Federal and State agencies, civilian academic institutions and associations, and other appropriate organizations.
- d. Maintain the official files, directories, and reports on Health Care interservice training.
- e. Disseminate status and decision reports, Staff Action Processing Forms, minutes and other appropriate written material to HC ITAB members and other appropriate authorities.
- f. Facilitate DAGs, QLGs, and other groups as designated by the Director of the HC ITO.
- g. Coordinate and support meetings and actions of the HC ITAB.
- h. Provide an analysis of cost and other data to the ITRO AHC via the Director of the HC ITO.
- i. Review and coordinate Service positions or concerns, and coordinate the HC ITAB perspective and/or positions and recommendations to the HC AHC.
- j. Maintain the Health Care Web Site.
- k. Provide briefings to the Services and other appropriate groups, such as the DMRTEC, professional organization, and other government agencies.
- l. Provide Secretariat with Health Care portion of the ITRO Annual Report.

7. **Health Care Interservice Training Advisory Board (HC ITAB).** The HC ITAB is the principal deliberative body within the health care interservice training structure. The HC ITAB shall develop plans and recommendations to achieve efficiencies in DOD health care training through consolidations (including collocations and the use of quota courses), outsourcing, the insertion of technology and the use of distance learning. They identify training to be studied and charter groups to conduct the analysis. They will review, and revise ongoing course consolidations approved by the DMRTEC and the ITRO. The ITAB establishes and appoints members to DAGs, QLGs, and other groups and monitors their progress.

a. The HC ITAB will coordinate and formulate Service positions for presentation to the DMRTEC via the ITRO AHC.

b. The HC ITAB will consist of four members from each Service, with one vote per Service. Members will be appointed as determined by each Service. It is recommended that the following be considered:

- (1) A representative of the office of the Surgeon General.
- (2) The commander of a medical training command.
- (3) A senior enlisted representative, as appropriate.
- (4) A representative from the parent training command.
- (5) A Reserve component representative.

c. Each Service will designate a HC ITAB member to be the primary point of contact and voting member. The voting member of the HC ITAB will be responsible for coordinating all issues and decisions within their Service. They will submit the names of their Service's representative to all groups as requested by the HC ITO. These designated representatives will have direct access to the ITRO AHC to provide information and clarification, and to receive guidance. These currently are:

- | | |
|---------------|--------------------------------|
| (1) Army | Dean, AMEDDC&S |
| (2) Navy | Surgeon General Representative |
| (3) Air Force | AETC/DOJ |

d. The HC ITAB will include a non-voting representative from OASD (HA)(HOP) as a member.

e. Representatives or subject matter experts from their Service to will provide information and/or participate in meetings or other actions as necessary.

f. The HC ITAB will meet in person at least semi-annually or at the request of the ITRO AHC.

g. Minutes will be kept on all HC ITAB meetings. The ITRO AHC will approve minutes on the discussions and actions. These minutes will be coordinated by the Services prior to presentation for accuracy prior to presentation to the ITRO AHC.

8. **Health Care Committees.** All HC Committees are chartered by the HC ITAB and have a representative from each military health service. They are facilitated by the HC ITO and report to the HC ITAB. They will provide minutes of all meetings to the HC ITO.

a. **Standards Committee.** The Standards Committee is responsible for developing the educational, quality of life, and administrative Standards that are utilized within Health Care interservice training. The members also draft the Standards into a manual, which they review and update annually. A complete revision will be performed every three years or when determined by the HC ITAB. The HC Standards Manual is a major resource document to assist HC QLG/DAGs in preparing recommendations. The Standards Manual will be reviewed by the HC ITAB and submitted to the DMRTEC for approval.

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b. **Advanced Distributed Learning (ADL) Committee.** The Advanced Distributed Learning Committee will serve as a central point of contact for ADL issues. It will assist QLG/DAGs in determining ADL options. It will make recommendations to the ITAB.

c. **Training Flow Management Committee.** The Training Flow Management Committee will serve as a central point of contact for the exchange of information on the student input to HC interservice training. They will reconcile changes from projected or requested student input between Services. In particular, they will assist in accommodating requests from any Service for increased training capacity. If resource changes are required, they will make recommendations and refer the issue to the HC ITAB. The members will attend each Service's annual planning conference to provide input from their Service.

d. **Program Of Instruction (POI) Committee.** The goal of the POI Committee is to help the host Services develop POI that are readily understood by the participating Services. They will attempt to achieve as much standardization and commonality of format as is possible.

9. **Health Care Advisory Groups.** The following are not chartered committees, but function as advisors and points of contact for their Service. They provide consultation and assistance, particularly in the staffing process.

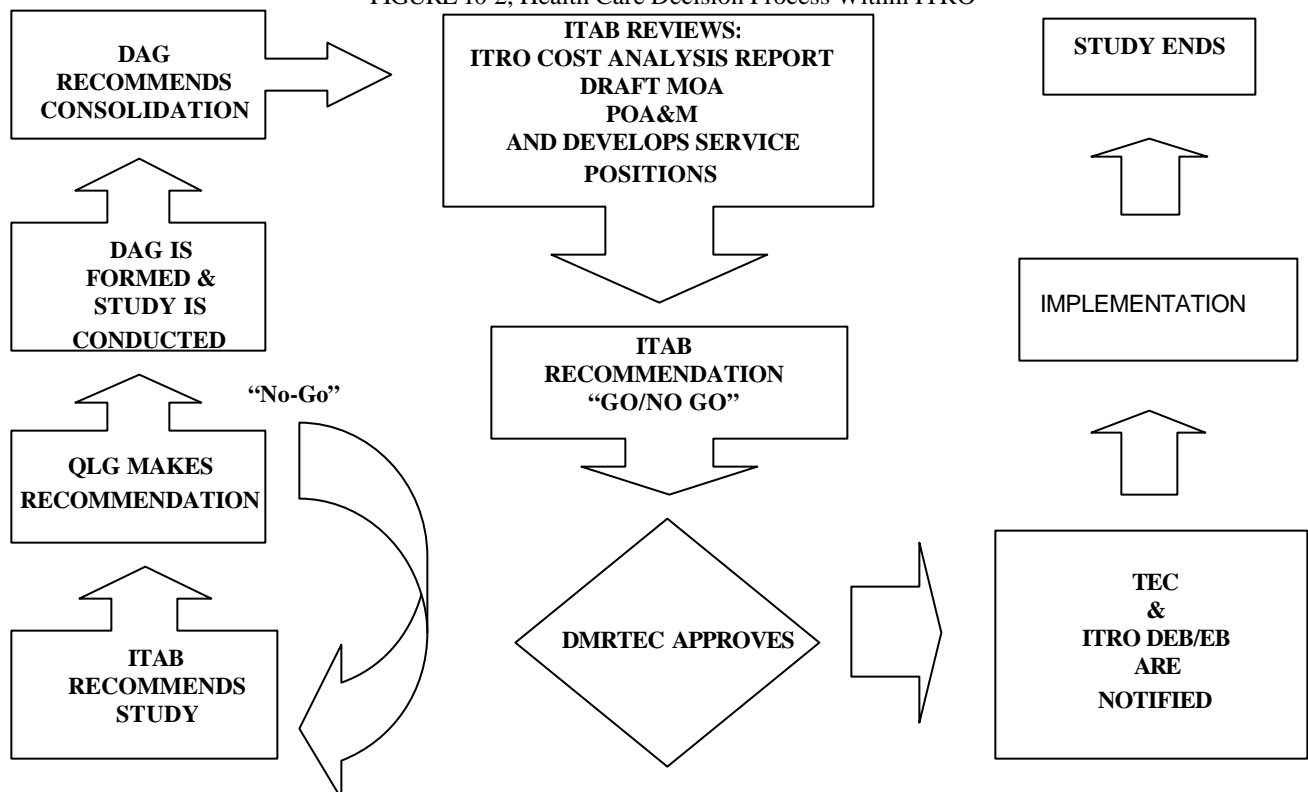
a. **Resource Analysts.** When Resource Analysts (manpower, facilities, and cost) are needed, the HC ITO will request support from the ITRO Resource Coordinator (USAF/AETC/DOJ) and that support will be obtained and scheduled. AMEDDC&S will provide for the Army, BUMED will provide for the Navy, and AETC will provide analysts for the Air Force. The Health Care resource analysts will attend all ITRO Rules of Engagement meetings.

b. **Memorandum Of Agreement (MOA) Coordinators.** Each Service will designate a single point of contact to coordinate the review and staffing of MOAs.

c. **Accreditation Advisors.** The Accreditation advisors are responsible for developing the process for establishing and maintaining institutional and programmatic accreditation, where applicable, in health care interservice training. The Accreditation advisors will assist, when requested, any established or planned interservice training program with accreditation issues. The Health Care accreditation process is described in section 4 of this appendix.

10. **Health Care Action Groups.** The roles and responsibilities of all Health Care Quick Look Groups (HC QLGs), Detailed Analysis Groups (HC DAGs), Chairs, Service Representatives, Subject Mater Experts (HC SME), and Implementation Groups are the same as those listed in the ITRO Procedures Manual. These groups are chartered by the HC ITAB and facilitated by the HC ITO.

FIGURE 10-2, Health Care Decision Process Within ITRO



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1. **Initiation of a Study.** Any Service, member of the HC ITAB, or the HC ITO may recommend a study. If the HC ITAB concurs, the HC ITO requests members for a QLG from each Service, with one Service designated as the lead.
2. **Quick Look Group (QLG).** The HC ITO provides a study charter and facilitates a meeting of the QLG to determine, as with any ITRO QLG, if enough commonality in the training exists between one or more Services to warrant a formal study. If the QLG recommends a study, they transition into a DAG. If the QLG finds insufficient commonality, they may recommend to the HC ITAB no further study. The HC ITAB may concur or direct a full study.
3. **Detailed Analysis Group (DAG).** The HC ITO facilitates meetings to develop a common core curriculum, identify training options, and conduct the Cost Analysis. This process is an opportunity for an innovative examination of different training modalities, such as outsourcing and Advanced Distributed Learning (ADL) and/or consolidation locations. However, the options selected for a Cost Analysis should primarily focus on training options that create maximum savings and efficiencies. To the greatest extent possible, new options should not exceed existing resources.
4. **DAG Recommendation.** Based upon the Cost Analysis, the DAG makes a recommendation to the HC ITAB and the recommendation is staffed to the ITAB voting members via a Staff Action Form (SAF) prepared by the HC ITO. The Cost Analysis, with the DAG recommendation, is attached to the SAF and submitted to the voting member from each Service to solicit a Service position. A recommendation to maintain the status quo will usually be made by the DAG if no cost or training efficiencies can be achieved. If the HC ITAB concurs, the study is terminated. However, the HC ITAB may also decide to select an option as a recommendation to the DMRTEC and proceed with the decision process. If the DAG recommends an option that will achieve efficiencies and HC ITAB concurs, the recommendation will be forwarded to the DMRTEC for decision.
5. **DMRTEC Decision.** The DMRTEC makes a decision based upon the recommendation of HC ITAB. If the decision is to proceed, preliminary planning begins and an implementation meeting and cost analysis are scheduled by the HC ITO. If the DMRTEC decides not to proceed, the study is terminated. The DMRTEC minutes record all consolidation and termination decisions. The HCITO will issue Interservice Executive Orders in the format shown in Figure 8 for key DMRTEC decisions impacting Interservice training. All HC IEOs will be signed by the ITRO Advisor for HC and numbered as follows: HCIEO, four digit year, and two digit sequence e.g.HCIEO-2001-01.
6. **TEC Role.** The TEC is notified of DMRTEC decisions to ensure that the medical community is kept informed.
7. **ITRO SC, DEB, and EB.** The HC ITO will keep the ITRO SC informed on the progress and results of studies and the resulting recommendations. The ITRO AHC will notify the ITRO DEB and EB of DMRTEC decisions.

HEALTH CARE ACCREDITATION

1. **Operation of the HC Accreditation Committee:** This committee functions in an advisory capacity rather than as a standing committee to assist with program accreditation. Members of the group will be composed of representatives from each service with a rotating chair and are responsible for establishing and maintaining oversight and quality assurance of institutional and programmatic accreditation, where applicable, in health care interservice training. The Advisory Committee acts as the central point of contact on accreditation issues and provides assistance and standardized guidelines to those programs seeking accreditation.
2. **General Information About Accreditation.** A collegial process of external peer review in which an agency grants public recognition to an institution or specialized program of study that meets established qualifications and educational standards through initial and subsequent periodic evaluations. Accreditation may be either institutional or programmatic. Institutional accreditation is the process whereby the institution itself, as opposed to a single program or course of instruction, within the institution, is accredited by a regional or national accrediting body

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such as the Southern Association of Colleges and Schools (SACS) or the Council on Occupational Education (COE). Programmatic accreditation is recognition within an institution to an individual -/program by an accrediting body that deals specifically with the occupational specialty.

3. Considerations of the DAG Regarding Accreditation. Detailed Analysis Groups (DAG) should take into consideration the requirements for programmatic accreditation when developing the curriculum for the courses under review for consolidation. Every effort should be made to develop a course, which meets the accreditation standards. However, inability to meet the standards for accreditation should not be considered a reason to terminate the consolidation study.

4. Accreditation Process. Details of the accreditation process are included in Chapter 1.1 of the Standards Manual for Health Care Interservice Training, July 1999 and on the flowchart Fig 10-3 and Programmatic Accreditation Checklist Figure 10-3. The host service seeking accreditation, maintaining, or improving accreditation status contacts the appropriate service representative on the Accreditation Advisory Committee to notify them of the intent to seek or continue accredited status. The advisory committee member will maintain oversight and provide guidance to the institution or program to facilitate a successful accreditation process. The host service and participating services follow the procedures set forth in the Standards Manual for Health Care Interservice Training, July 1999, and in this section of the Procedures Manual.

5. Method of Changing an Accreditation. Changes to an existing accreditation are to be conducted in accordance with the Standards Manual, and coordinated with the appropriate representative on the Accreditation Advisory Committee.

6. American Council on Education (ACE). All interservice courses are required to submit programs of instruction to obtain college credit recommendations from the American Council on Education (ACE). The Air Force is evaluated by the CCAF, and ACE recommendations for Air Force courses are based upon the credit value assigned by the CCAF. This process is entirely separate from the institutional accreditation process.

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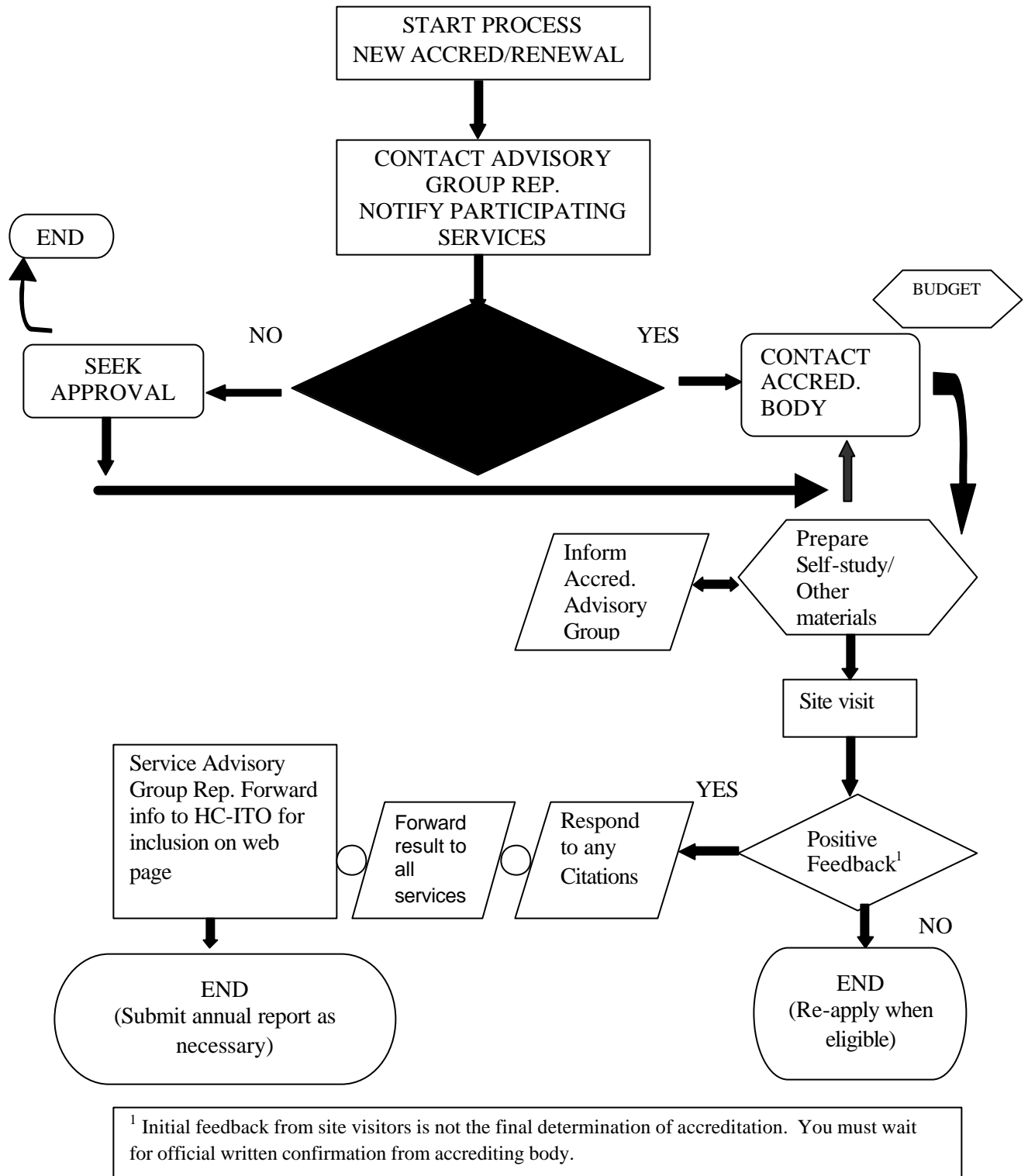


Figure 10-3, Programmatic Accreditation in Health Care Training

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PROGRAMMATIC ACCREDITATION CHECKLIST

ITEM	COMMENTS	DATE COMPLETED
1. Contact Appropriate Service Representative		
2. Officially apply for initial or continuing accreditation	Budget for accreditation costs including site visit	
3. Contact accreditation body for materials, guidelines, essentials, application, standards	Research/Analyze Guidelines - Does program meet requirements for accreditation? Assemble a committee to work on accreditation – host service chair, ensure coordination with all services through accreditation representative	
4. Establish a plan of action and milestones		
5. Write the self-study	Answer all questions completely Critically evaluate your program Assemble supporting documentation	
6. Site visit	Protocol Each service should be involved Brief students and staff Schedule in/out brief Exhibits Phase II	
7. Report of Findings	Draft vs. final confirmation CAUTION – Respond to all items as required Provide copy to accreditation rep.	
8. Provide update information on accreditation to the accreditation group for inclusion on HC-ITO web site.		

FIGURE 10-4, Programmatic Accreditation Checklist

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APPENDIX A

ITRO STUDY CHARTER

The following constitutes a basic ITRO Study Charter. It will be included in the ITRO Staff Action Form announcing initiation of the Quick Look:

1. The ITRO Deputy Executive Board [at its (date) meeting] or via staff action determined that the functional area of _____ training will be studied for consolidation or collocation.
2. The (Service) will chair the Quick Look Group (QLG) meeting to determine the feasibility of consolidating and/or collocating training. The (Same Service) will act as facilitator for the duration of the study, providing advice and assistance to the QLG and, if appropriate, Detailed Analysis Group (DAG).
3. Quick Look Group members appointed by their parent Services will complete ITRO Form 1 and 2 prior to the QLG meeting. The QLG members are empowered to fully investigate the respective functional area. The Quick Look Group will:
 - a. Determine the scope of the study.
 - b. Identify ways to consolidate/collocate at least cost.
 - c. Ensure Service training requirements can be met.
4. Report out feasibility of continuing into Detailed Analysis not later than (1 week). If the Quick Look Group determines there is sufficient training commonality or basis for detailed analysis, it will transition to a Detailed Analysis Group (DAG). Concurrent with the transition and as part of its Quick Look Report, the group will expand its charter and include it in the Quick Look report. The scope of the expanded charter is at the discretion of the DAG, but will include at least the following:
 - a. The title of each occupational field to be included in the study, followed by the all MOSs, NECs and AFSCs included and as appropriate, for each Service. (ITRO Form 3)
 - b. The title and current location of each existing course, by Service, to be included in the study (ITRO Form 3).
2. The following statement: "The DAG will conduct an analysis to determine the cost and training-effectiveness of consolidated or collocated training. Detailed Analysis Group members should complete their review within 6 months from the completion of the QLG." As with the Quick Look, DAG members are empowered to fully investigate the respective functional area with the goal of developing a consolidated training program designed to meet all Services' training needs, or prepare a fully justified explanation of why consolidation/collocation is not recommended. The expanded DAG Charter, which should include the original wording from the Quick Look charter, will be attached to the Quick Look report. The DEB members will record their concurrence on the ITRO Staff Action Processing Form accompanying the Quick Look Report.

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APPENDIX B

LIST OF ITRO FORMS

TRAINING TASK/SKILL REQUIREMENTS LISTING (ITRO FORM 1)
TRAINING TASK/SKILL REQUIREMENTS COMPARISON (ITRO FORM 1A)
COURSE DATA (ITRO FORM 2)
MANPOWER REQUIREMENTS CHECKLIST (ITRO FORM 3)
FACILITY QUESTIONNAIRE (ITRO FORM 4)
Facilities Report	
Facility Worksheet	
Facility Manpower Data Sheet	
Facility Analysis Guidance Form	
CURRENT FACILITY CONFIGURATION OR SPACE AVAILABLE (ITRO FORM 5)
PROPOSED FACILITY CONSOLIDATED OR COLLOCATED CONFIGURATION (ITRO FORM 6)
12 QUESTION FORM (ITRO FORM 7)
Instructions for ITRO Form 7	

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TRAINING TASK/SKILL REQUIREMENTS LISTING (ITRO FORM 1)	
SERVICE:	
STUDY/FUNCTIONAL AREA TITLE	
SOURCE DOCUMENTS	
TASK/SKILL LISTING	
Task/Skill <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div>	Remarks <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div>

SERVICE REPRESENTATIVES MUST COMPLETE THESE FORMS FOR EACH MOS/NEC/AFSC AND/OR COURSE COVERED BY THE FUNCTIONAL AREA BEING CONSIDERED BY THE QLG/DAG. FORMS ARE TO BE COMPLETED PRIOR TO THE QL MEETING. DATA FROM THIS FORM WILL BE COMBINED IN ITRO FORM 1A AT THE QL MEETING. THIS DOCUMENT MAY BE CREATED OR REPRODUCED LOCALLY, MAY BE HANDWRITTEN, AND WILL BECOME A PERMANENT PART OF THE ITRO STUDY RECORD FOR THE FUNCTIONAL AREA BEING STUDIED.

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[illegible]

SERVICE REPRESENTATIVES WILL COMPLETE THIS FORM AT THE QUICK LOOK MEETING. THIS DOCUMENT MAY BE CREATED OR REPRODUCED LOCALLY, MAY BE HANDWRITTEN, AND WILL BECOME A PERMANENT PART OF THE ITRO STUDY RECORD FOR THE FUNCTIONAL AREA BEING STUDIED.

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[illegible]

SERVICE REPRESENTATIVES MUST COMPLETE THESE FORMS PRIOR TO THE QL MEETING. THIS DOCUMENT MAY BE CREATED OR REPRODUCED LOCALLY, MAY BE HANDWRITTEN, AND WILL BECOME A PERMANENT PART OF THE ITRO STUDY RECORD FOR THE FUNCTIONAL AREA BEING STUDIED.

¹ Course Length is based on a 5-day, 40-hour academic week.

² LOAD (AOB) = INPUT X COURSE LENGTH (Academic Weeks) ÷ 50

³ Indicate Grade (Civilian and/or Military)

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MANPOWER REQUIREMENTS CHECKLIST (ITRO FORM 3)			
Option (Number and Details):			
From Notional POI:			
	Course Number:		
	Max Class Size:		
	Student to Instructor Ratio:		
	Lecture:		
	Practical Application:		
	Lab:		
	Testing:		
	Syllabus Hours:		
	Consolidated:		Collocated:
	Lecture:		Lecture:
	Practical Application:		Practical Application:
	Lab:		Lab:
	Testing:		Testing:
Training Support/School Overhead Requirements:			
	Maintenance:		
	Curriculum Development:		
	Academic Records:		
	Other:		
Detachments:			
	Existing Detachment/Support by Service:		
	Unique Requirements by Service:		
	List of Required Collocated Courses:		
	Remarks:		

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FACILITY QUESTIONNAIRE (ITRO FORM 4)

DATE: _____

STUDY TITLE: _____

OPTION/LOCATION: _____ / _____

PREPARED BY: _____ PHONE: _____

1.a. What is the projected average daily excess capacity in all bachelors housing for the fiscal year being studied? (This includes TAD/TDY, PCS, NPs and all other bachelor quarters on installation).

	ENLISTED		OFFICER
	MODULES	PERSONNEL	
1 + 0			
2 + 0			
1 + 1 (Min 115 NSF/PN)			
2 + 2 (Min 90 NSF/PN)			
Other (Please Define)			
Officer (250 NSF/PN)			
TOTAL			

Bachelor Housing POCs :Name _____ Phone _____

Name _____ Phone _____

1.b. Provide current student AOB/ADSL by pay grade (Only personnel who are part of the study).

E1 - E4 _____ E5 - Above _____ W1-02 _____

1.c. Any additional facilities, which could be converted into adequate billeting assets (If "yes," attach description)?

2. Describe ability for local economy to support increased load. Attach latest installation housing survey.

3. Provide dining facilities data in persons (PN)

a. Seating Capacity _____ PN

b. Average number of persons (E4/Below) served per meal _____ PN

(Use meal with heaviest load)

4. What are the class sizes for the POI in this study?

CLASS NAME SIZE

Consolidated Classes _____

Collocated Classes _____

Service Unique Classes _____

5. Provide documentation for all programmed projects associated with the training being studied.

6. Provide BRAC initiatives impacting study.

7. Complete a CURRENT CONFIGURATION form showing space used for this training.

Complete a second form for any other available training space. Include in the notes section: (1) the type of construction and condition of each building, (2) indicate the number of classrooms and labs by relative size: (i.e., classrooms – 2 @ 400 SF; 4 @ 500 SF; labs –1 @ 1200 SF; 2 @ 1800 SF, etc)

8. Complete a PROPOSED CONFIGURATION form for your service's portion of the consolidated training and a second form for any collocated training. Be prepared to complete a combined PROPOSED CONFIGURATION form in conjunction with other services to reflect minimum requirements by eliminating duplicate or excess space.

9. Provide base map showing all facilities involved in this ITRO study.

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FACILITIES REPORT

DATE: _____

STUDY TITLE: _____

LOCATION: _____

8. OBJECTIVES

- a. Provide information and preliminary cost estimates for the consolidation and/or collocation of _____ training.
- b. Determine adequacy of facilities currently being used and their capacity to handle the increased load.
- c. Determine modification, rehabilitation, and/or new construction requirements with their associated costs.

9. SCOPE

- a. Identify academic and support requirements for the subject training using FY__ training loads.
- b. Present a general description of the academic and support facilities available for this training.
- c. Identify facility construction and/or alteration requirements.
- d. Provide cost estimates for these requirements using FY__ dollars.
- e. Normally an analysis of family housing requirements and assets is not included in the report. In most cases the off base community is fully capable of providing the necessary family housing support. In any case where adequate family housing does not exist, it is anticipated that private enterprise will respond quickly and provide for any increased demand for family housing.

10. OPTIONS

- a. Options 1
 - (1) Course 1 consolidated at XXX.
 - (2) Course 1 USXX Service unique at XXXX.
 - (3) Course 2 collocated at XXXX.
- b. Option 2
- c. Etc

11. ASSUMPTIONS

- a. It will be feasible to build additions to existing facilities, operate in separate facilities, or rearrange training such that new construction is necessary for only the additional square footage required and not the total consolidated requirement.
- b. An Environmental Assessment (EA), if required will result in a "Finding Of No Significant Impact" (FONSI).
- c. A decision will be made in sufficient time to allow the required construction to be programmed and entered into the appropriate annual funding program for accomplishment.
- d. Minor costs are associated with any change of room usage. The facility cost estimates in this report include a small dollar amount to cover the cost of any required minor modifications, such as additional electrical service in a room, change in access door configuration or other minor change to an existing space.

12. METHODOLOGY

- a. Instructional Space. All instructional space requirements, general and applied, were developed using input from Subject Matter Experts (SMEs) and reviewed by members of the Facilities Committee. Space allowance for general classrooms is 30 NSF per student. Applied space requirements were developed by SMEs based on equipment size and space needed for students and safety clearances. Consolidated training requirements were negotiated between SMEs and agreed to by each Service. The cost of training facilities includes only costs for the space required for each option.
- b. Billeting. Billeting capacities are determined using ITRO standards (APPENDIX C, Figure 1) based on DOD housing utilization standards. Also, a management factor of 1.2 is applied to the E1 through E4 students and a factor of 1.15 is applied to officers and E5 and above students. The cost of any required additional capacity is computed based on the new construction criteria in the ITRO procedures manual APPENDIX C, Figure 1.
- c. Dining. Capacities of enlisted dining facilities are based on a serving time of 120 minutes at 30-minute intervals. The required capacity for each option is equal to 90% of the number of students in pay grades E1 through E4. If the required capacity is greater than the available capacity, the cost of the difference, the additional capacity, is computed on the basis of 20 gross square feet per person.

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d. Cost Breakdown. Construction up to \$500,000 and all repairs is O&M dollars, while all construction over \$500,000 is MILCON. Cost is assigned to the various Services on the following basis:

- (1) Host pays for all consolidated training facilities, (except when host is not included in the consolidation) and all consolidated/collocated billeting and dining facilities.
- (2) Service owning training pays for collocated and Service unique training facilities.
- (3) Training facilities will be assigned first to consolidated courses, second to Service unique courses, and third to collocated courses.
- (4) If two or more Services have collocated training at the same site, any remaining excess space will be prorated on the basis of AOB/ADSL.
- (5) It should be noted that all cost assignments are estimates based on general factors, assumptions, and data provided by the Service subject matter experts. They may change when refined during implementation.

13. FACILITY COST FACTORS

a. The cost of new construction for each option site is developed by multiplying the size of the facility by 1.33 to convert net area to gross area, when appropriate, then by the budget unit cost and the assigned area cost factor. The cost of alteration is computed at 30% of new construction for minor alteration or 60% of new construction for major alteration. The cost of minor modification is computed at \$10/SF times the area to be modified times the area cost factor.

b. While cost estimates in this report are preliminary, they do provide an accurate order of magnitude cost of each option. The following facility cost factors were used.

?? Facility Base Unit Cost from DOD FY96 Cost Guide (Latest Available)

?? Supporting Facilities Factor = 1.20

?? Contingency Factor = 1.05

?? Supervision/Inspection/Overhead Factor = 1.06

c. Using the above factors, the base unit cost for new construction is converted to budget unit cost as follows.

TRAINING FACILITIES =

$\$100.00/\text{GSF} \times 1.20 \times 1.05 \times 1.06 = \$133.56/\text{GSF}$

Plus 5% for furniture = \$140.24/GSF

say \$140/GSF

BILLETING FACILITIES =

$\$94.00/\text{GSF} \times 1.20 \times 1.05 \times 1.06 = 125.55/\text{GSF}$

Use $212\text{GSF}/\text{SPACE} \times \$125.55/\text{GSF} = \$25,110.00/\text{SPACE}$

Plus 10% for furniture = \$27,621.00/SPACE

say \$27,600/SPACE

DINING FACILITIES =

$\$147.00/\text{GSF} \times 1.20 \times 1.05 \times 1.06 = \$196.33/\text{GSF}$

Use $20\text{GSF}/\text{PN} \times \$196.33/\text{GSF} = \$3926.60/\text{PN}$

Plus 5% for furniture = \$4122.93/PN

say \$4100/PN

d. The area cost factor for each site is as follows:

?? Ft Gordon GA = 0.86

?? Keesler AFB MS = 0.89

?? Norfolk VA = 0.92

14. FACILITY REQUIREMENTS AND COST COMPUTATIONS BY OPTION. (When report is complete delete lines that are not applicable.)

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FACILITIES WORKSHEET

1. FACILITY REQUIREMENTS AND COST COMPUTATIONS BY OPTION.

COST FACTORS (FY 00 dollars)

Training	\$157
Facilities Cost	
/SF =	
Billeting Facilities	\$38,000
Cost/Space=	
Dining Facilities	\$5,100
Cost/Pn =	
Ft Gordon, GA Area Cost	0.86
Factor	
Keesler AFB, MS Area	0.89
Cost Factor=	
Norfolk, VA Area Cost	0.92
Factor=	

OPTION 2

OPTION 2A Army, Navy, & Marine Corps at FT GORDON
a. MANPOWER CONSOLIDATION TRAINING:

	STUDENT AOB/ADSL			STUDENT		
SERVIC E	OFFICE R	E1-E4	E5+	TOTAL	ADMIN	INSTR
USAF	0	0	0	0	0	0
USA	3	54	23	80	0	10
USN	0	16	37	53	1	6
USMC	0	6	9	15	0	2
TOTALS	3	76	69	148	1	18

b. MANPOWER COLLOCATED TRAINING:

	STUDENT AOB/ADSL			STUDENT		
SERVIC E	OFFICE R	E1-E4	E5+	TOTAL	ADMIN	INSTR
USAF	0	0	0	0	0	0
USA	0	0	0	0	0	0
USN	0	0	0	0	0	0
USMC	0	0	0	0	0	0
TOTALS	0	0	0	0	0	0

c. FACILITY REQUIREMENTS:

	CONSOL TRAININ G (SF)	COLLOC TRAININ G (SF)	BILLETIN G (SP)	DINING (PN)
FACILITI ES REQUIRE D	10,456	0	250	68
REQD TOTAL	10,456	0	250	68
EXISTIN G	43,888	0	615	294
CONSTRUCT	0	0	0	0
MOD, MAJOR (60%)	0	0	0	0
MOD, MINOR (30%)	0	0	0	0
MINOR SITE	10,456	0	0	0

d. FACILITY COST CONSOLIDATED TRAINING:

NEW CONSTRUCTION:	O & M	MILCON
-------------------	-------	--------

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	Consol Trng Fac (0 SF x \$ 157 x 0.86)	0	0
	Billeting (0 Spaces x \$ 38000 x 0.86)	0	0
	Dining Facility (0 PN x \$5100 x 0.86)	0	0
	TOTALS:	0	0
	MODIFICATIO	O & M	MILCON
	NS:		
	Consol Trng Fac (0 SF x \$ 157 x .60 x 0.86)	0	0
	Consol Trng Fac (0 SF x \$ 157 x .30 x 0.86)	0	0
	Minor Site Prep Consol Trng Fac (10456 SF x \$10 x 0.86)	89,922	0
	Billeting (0 Spaces x \$38000 x .60 x 0.86)	0	0
	Dining Facility (0 PN x \$5100 x .60 x 0.86)	0	0
	TOTALS:	89,922	0
	TOTAL COST OF OPTION 2A=	89,922	
OPTION 2B	Air Force at KEESLER		
	a. MANPOWER CONSOLIDATION TRAINING:		
	STUDENT	STUDENT	
	AOB/ADSL		
SERVICE	OFFICE	E1-E4	E5+
	R		
USAF	0	48	22
USA	0	0	0
USN	0	0	0
USMC	0	0	0
TOTALS	0	48	22
	MODIFICATIO	O & M	MILCON
	NS:		
	Consol Trng Fac (0 SF x \$ 157 x .60 x 0.92)	0	0
	Consol Trng Fac (0 SF x \$ 157 x .30 x 0.92)	0	0
	Minor Site Prep Consol Trng Fac (6720 SF x \$10 x 0.92)	61,824	0
	Billeting (0 Spaces x \$38000 x .60 x 0.92)	0	0
	Dining Facility (0 PN x \$5100 x .60 x 0.92)	0	0
	TOTALS:	61,824	0
	TOTAL COST OF OPTION 7C	61,824	
2. FACILITY COST SUMMARY (BY NEW CONSTRUCTION AND MODIFICATIONS):			
OPTION 2A	at FT GORDON		
	COST DISTRIBUTION	NEW CONSTR	MODIFICATIONS
	USA CONSOLIDATION	(MILCON 0	0
)	
		(O&M) 0	89,922
	TOTAL COST OF OPTION 2A		89,922
OPTION 2B	At KEESLER		
	COST DISTRIBUTION	NEW CONSTR	MODIFICATIONS
	USAF	(MILCON 0	0
	CONSOLIDATION)	
		(O&M) 0	15,000
	TOTAL COST OF OPTION 2B		15,000
	TOTAL COST OF OPTION 2=		104,922
OPTION 6A	At FT GORDON		
	COST DISTRIBUTION	NEW CONSTR	MODIFICATIONS
	USA CONSOLIDATION	(MILCON 0	0
)	
		(O&M) 0	72,343
	TOTAL COST OF OPTION 6A		72,343

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OPTION 6B	At KEESLER		
	COST DISTRIBUTION	NEW CONSTR	MODIFICATIONS
	USAF	(MILCON 0	0
	CONSOLIDATION)	
		(O&M) 0	15,000
	TOTAL COST OF OPTION 6B		15,000
OPTION 6C	At NORFOLK		
	COST DISTRIBUTION	NEW CONSTR	MODIFICATIONS
	USN CONSOLIDATION	(MILCON 0	0
)	
		(O&M) 0	56,396
	TOTAL COST OF OPTION 6C		56,396
	TOTAL COST OF OPTION 6=		143,739
OPTION 7A	At FT GORDON		
	COST DISTRIBUTION	NEW CONSTR	MODIFICATIONS
	USA CONSOLIDATION	(MILCON 0	0
)	
		(O&M) 0	53,664
	TOTAL COST OF OPTION 7A		53,664
OPTION 7B	At KEESLER		
	COST DISTRIBUTION	NEW CONSTR	MODIFICATIONS
	USAF	(MILCON 0	0
	CONSOLIDATION)	
		(O&M) 0	15,000
	TOTAL COST OF OPTION 7B		15,000
OPTION 7C	At NORFOLK		
	COST DISTRIBUTION	NEW CONSTR	MODIFICATIONS
	USN	(MILCON 0	0
	CONSOLIDAT)	
	ION	(O&M) 0	61,824
	TOTAL COST OF OPTION 7C		61,824
	TOTAL COST OF OPTION 7=		130,488

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FACILITY MANPOWER DATA SHEET

(TO BE COMPLETED BY THE MANPOWER ANALYST FOR EACH SERVICE)

SERVICE:		DATE:							
STUDY:									
PREPARED BY:		NOTE:							
NOTE: Provide TOTAL consolidated and TOTAL collocated student and staff personnel for each option as follows:									
OPTION	CATEGORY	STUDENTS; AOB/ADSL							
		E1-E4 NPS OR TDY	E1-E4 PCS & PS	E5-E6 TDY	E5-E6 PCS	W1-02 TDY	W1-02 PCS	ADMIN/ DET	Instructors
	Consolidated								
	Collocated								
	Unique Service								
	Consolidated								
	Collocated								
	Unique Service								
	Consolidated								
	Collocated								
	Unique Service								
	Consolidated								
	Collocated								
	Unique Service								
	Consolidated								
	Collocated								
	Unique Service								
	Consolidated								
	Collocated								
	Unique Service								

NPS - Non Prior Service

PS - Prior Service (Includes Navy Specialized Skill Training, "C" School)

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FACILITY ANALYSIS GUIDANCE

1. The ITRO Facilities Report analyzes the following facility types: Training, Housing and Dining Facilities.

a. Data for the facility analysis report should be provided by DAG Subject Matter Experts to members of the Facility Committee one week prior to the costing DAG meeting. The required data on existing training facilities is as follows. A "Current Configuration or Space Available" (Appendix C) form should be completed to provide data on existing assets in two ways. First, space currently being use for this training; then on a separate form, space which could be made available for expanding training at your site. All areas are net areas (i.e. areas computed using interior room dimensions). Do not include toilets, hallways, mechanical space, etc.

b. A "Proposed Facility Consolidated or Collocated Configuration" (ITRO Form 6) form should be completed to provide data on facilities required for proposed course(s). Facilities space required for separate courses should be combined for all consolidated courses. Each collocated and Service unique course should be included on a separate Form 6. Do not include toilets, hallways, mechanical space, etc. All areas should be defined in net square feet.

INSTRUCTIONAL SPACE

Classroom Space for general purpose classrooms.

Lab or Shop Training space which includes simulators, equipment and/or work benches

Highbay Area Lab or shop space which requires special overhead clearance.

SUPPORT SPACE

Administrative Office space for personnel performing administrative functions in support of training.

Instructor Office space for instructor personnel.

Contractor Office or maintenance space for contractors.

Conference Room Space reserved for staff conferences.

Computer Space for central computer. Rooms with PCS for training are considered to be lab instructional spaces.

Storage Space for training material and/or equipment.

Instructor Lounge Coffee mess and/or lounge facility.

Break-room/Student break area.

c. Billeting Spaces. Provide information as requested on Figure 17. Provide only excess billeting available for this study. Do include all excess billeting at the installation in the categories in Figure 17.

d. Dining Facilities. Provide the number of people that could be fed with single seating. (I.e., number of chairs) Also provide average number of people served for your largest meal.

2. **COST AVOIDANCE.** Provide documentation for any programmed facility project that could be eliminated if this training is moved to another site.

3. Contact your service's ITRO Facilities representative if you have any questions.

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CURRENT FACILITY CONFIGURATION OR SPACE AVAILABLE (ITRO FORM 5)				
STUDY: _____		DATE: _____		
PREPARED BY: _____		LOCATION: _____		
		PHONE: _____		
NET SPACE AVAILABLE (SF)				
TRAINING SPACE	BLDG	BLDG	BLDG	BLDG
CLASSROOM	_____	_____	_____	_____
LAB/SHOP	_____	_____	_____	_____
HIGHBAY AREA	_____	_____	_____	_____
OTHER (____)	_____	_____	_____	_____
OTHER (____)	_____	_____	_____	_____
SUPPORT SPACE				
ADMINISTRATIVE	_____	_____	_____	_____
INSTRUCTOR	_____	_____	_____	_____
INSTRUCTOR LOUNGE	_____	_____	_____	_____
CONTRACTOR	_____	_____	_____	_____
CONFERENCE ROOM	_____	_____	_____	_____
COMPUTER	_____	_____	_____	_____
BREAK-ROOM	_____	_____	_____	_____
OTHER (____)	_____	_____	_____	_____
OTHER (____)	_____	_____	_____	_____
OTHER (____)	_____	_____	_____	_____
TOTAL NET AREA				

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PROPOSED FACILITY CONSOLIDATED OR COLLOCATED CONFIGURATION (ITRO FORM 6)	
STUDY: _____ PREPARED BY: _____	DATE: _____ LOCATION: _____ PHONE: _____
NET SPACE AVAILABLE (SF)	
TRAINING SPACE	TOTAL
CLASSROOM	_____
LAB/SHOP	_____
HIGHBAY AREA	_____
OTHER (____)	_____
OTHER (____)	_____
SUPPORT SPACE	
CONTRACTOR	_____
CONFERENCE ROOM	_____
COMPUTER	_____
STORAGE	_____
OTHER (____)	_____
OTHER (____)	_____
OTHER (____)	_____
ITEMS TO BE COMPLETED BY FACILITY COMMITTEE	
ADMINISTRATIVE	_____
INSTRUCTOR	_____
INSTRUCTOR LOUNGE	_____
BREAK ROOM	_____
TOTAL NET AREA	

**INTERSERVICE TRAINING REVIEW ORGANIZATION
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**COST ANALYSIS DATA REQUIREMENTS FORM (ITRO FORM 7)
12 QUESTION FORM**

(TO BE COMPLETED BY EACH SERVICE FOR EACH OPTION)

1. Option Number & Description
2. Course Number and Title
3. Current Location:
4. Proposed Location
5. Course Length in weeks (All ITRO consolidated courses are based on a 40 hour academic week):
 - a. Baseline:
 - b. Proposed
6. Student Input/Entries: Source:
7. Student Status (percentage):
 - a. Pipeline/PCS:
 - b. TDY/TAD
8. Average Student Grade:
9. Travel Information:
 - a. Students: Provide list of sites from which students originate and number (or percentage) of students from each site. If student origins cannot be enumerated, so state.

Site	Number of Students
(1)	
(2)	
(3)	
 - b. Staff: (See instructions)

No. of Trips	No of People	No. of Days
--------------	--------------	-------------

 - (1) Implementation:
 - (2) Surveillance:
10. Equipment Cost/Savings: Enter cost in current FY dollars under recurring or one time.

One-Time	Recurring
----------	-----------
11. Cost Avoidance: Identify any cost avoidance, which would occur as a result of this option
12. POCs: Provide names, office, and phone numbers for persons responsible for course and equipment data.
 - a. Course Data: _____
 - b. Equipment Data:

Remarks:

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THE FOLLOWING INSTRUCTION APPLY TO EACH OF THE TWELVE ITEMS ON THE COST DATA REQUIREMENTS FORM (ITRO FORM 7):

Option Number. Indicate the option for which the data was developed. Each Service must complete a form for each option in which they are participants.

Course Number and Title. Provide course identification number and complete course title. If multiple courses are involved, list them on separate forms and complete items 5, 6 and 7.

Current Location. Identify school and installation/base, (e.g., Armor School, Ft Knox, KY) where training will be conducted in the baseline year if ITRO were not a consideration. Note: FY00 is probably the baseline year for cost analysis conducted in FY98.

Proposed Location. Identify the location for the proposed consolidation/collocation for this option.

Course Length. Determine the course length for both the baseline (e.g., FY97 without ITRO) and proposed courses. *All ITRO courses are based on a 40-hour academic week.* Identify length in terms of training weeks, with 1 training day equal to 0.2 weeks. See note for item 2 if multiple courses are involved.

Student Input/Entries. State the approved student training input utilizing the latest available Service documentation. Indicate the "as of" date and source document title.

Student Status by Category. Pipeline includes students who are TDY/TAD in conjunction with PCS (e.g., recruit graduates undergoing school training before reporting to unit of assignment). It also includes purely PCS students when the course length exceeds 20 weeks. Students in a TDY/TAD status are, for the most part, those who attend course and return to their parent unit of assignment.

Average Student Grade. Enter the mean pay grade of all students in the course.

Travel Information

a. For student travel, identify each leg of travel within the training community in terms of (1) number of students and (2) base of origin (i.e., BT/RTC, school, etc.). Consider the necessity for students to report to the baseline location for administrative or other purposes before or after training at the relocated site. If students originate from various CONUS/OCNUS sites, making it difficult or impossible to enumerate, so state.

b. For staff travel indicate the number of trips, number of people, and number of days required for all implementation trips necessary to establish the consolidated/collocated training program. Do the same for all surveillance or inspection trips to be conducted after the consolidation/collocation program becomes operational.

Equipment Cost

a. Procurement. If additional equipment is required for the increased load, the host Service should coordinate with the participating Services to determine the availability of that additional equipment. Any additional equipment requirements will be documented with identification, quantity, and cost. That authenticated document will be provided to the Service's cost analyst.

b. Maintenance. Enter only the incremental/decremental maintenance costs resulting from consolidating or collocating training. If maintenance is performed by contract, care should be exercised to ensure there would be no penalty for early termination.

c. Operation. Same as Maintenance.

d. Transfer. The cost of packing, crating, and shipping is the responsibility of the shipping Service. Also include the cost of de-installing and reinstalling equipment that is transferred. Provide equipment list as a separate attachment with authentication of transportation officials.

e. Other. Use this section to identify any other equipment related costs not included in a through d above.

Cost Avoidance is a consideration when programmed procurement or construction can be prevented by consolidation/collocation. Cost avoidance for programmed projects may be offset against one-time costs provided the item has been reviewed and entered into programming documents at the Service level and adequate disclosure is provided

Points of Contact. Self-explanatory.

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APPENDIX C

INTERSERVICE TRAINING REVIEW ORGANIZATION STAFF ACTION PROCESSING FORM		
Action Number:	Staffing Codes: X – Originator A – Appropriate Action C – Comment D – Concurrence I – Information Y – Coordination R – Return/Reply to _____	Suspense/Due Date:
Subject:		
Addressees:		Staffing Codes
Chairman, ITRO Steering Committee/ITRO Secretariat		
Headquarters, TRADOC (ATTG-ITRO), Fort Monroe, Virginia 23651-5000		
Chief of Naval Education & Training (ETE4), 250 Dallas St., NAS Pensacola, FL 32508-5220		
Director, Training & Education Division, MCCDC (C474), 2042 South Street., Quantico, VA 22134-5027		
Dir, Joint & Interservice Training, HQ AETC/DOJ, 2 F St., Suite 2, Randolph AFB, TX 78150-4325		
Director, HC-ITO, (MED-05C), 2300 E. St., NW, Washington, DC 20372-5300		
Chief, Office of Training & Performance (G-WTT), USCG, 2100 2 nd St. NW, Washington, DC 20593-0001		
Remarks:		
Signature:		Date:
RESPONSE/REPLY		
From:		
Remarks:		
Signature:		Date:

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INSTRUCTIONS FOR ITRO STAFF ACTION FORM

1. Any ITRO office or committee may use the Staff Action Form. Action Numbers, however, will only be used and assigned by the Secretariat/HC-ITO.
- /Reply to _____. If used, complete the underscored portion.
2. If a response is requested, originator must clearly indicate level (EB, DEB, DMRTEC, SC, or other) of desired response in the remarks block. For example, if item requires DEB comment or concurrence, originator will clearly state, "DEB comment Originator may modify the address block as necessary.
3. Place the appropriate letter(s) in the Staffing Codes block. Codes are defined as follows:
 - X - Originator. Used only by the originator. No other codes should appear in the originators row.
 - A - Appropriate Action. Action as indicated in the Remarks block.
 - C - Comment. Self-explanatory; will always include the Code "R".
 - D - Concurrence. Self-explanatory; will always include the Code "R".
 - I - Information. Self-explanatory.
 - Y - Coordination. To be used only for the initial, Steering Committee level staffing of a preliminary or final cost analysis.
4. R - Return and/or concurrence Requested" in the remark block. Originators can also indicate desired level of response in "Staffing Codes" block; e.g., D (DEB), I (EB), etc.
5. Originators and responders are welcome to expand their "Remarks" block, as necessary.
6. If response is signed by anyone other than the principal, signer will include an appropriate indicator ("FOR. . .," "By direction," etc.) that the comment or concurrence is in the names of the EB, DEB, DMRTEC or SC member.
7. The RESPONSE/REPLY is understood to be to the originator. All other recipients are "Information" addressees unless otherwise indicated in the REMARKS.

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APPENDIX D

SAMPLE MEMORANDUM OF AGREEMENT (MOA)

*(This MOA template is provided as a **GUIDELINE** to assist the **DAG** or the **Host MOA development team** in drafting and finalizing MOAs. This is not meant to be a comprehensive or arbitrary format and must be supplemented to meet the needs of each training configuration. Provisions of each paragraph are subject to negotiation except regulatory provisions)*

**MEMORANDUM OF AGREEMENT BETWEEN
INTERSERVICE TRAINING REVIEW ORGANIZATION (ITRO)
MEMORANDUM OF AGREEMENT (MOA)
AMONG
THE UNITED STATES ARMY (USA)
AND
UNITED STATES NAVY (USN)
AND
UNITED STATES AIR FORCE (USAF)
AND
UNITED STATES MARINE CORPS (USMC)
AND
UNITED STATES COAST GUARD (USCG)**

1. **SUBJECT:** Consolidation and/or collocation of (title of training) at (host site).
2. **PURPOSE:** The purpose of this MOA is to establish host and participating Services' responsibilities, agreements, and understandings for the conduct of operations associated with the following:
 - (1) **Consolidated Courses Course Title(s)**
 - (a) Army (Service course number)
 - (b) Navy (Service course number)
 - (c) Air Force (Service course number)
 - (d) Marine Corps: (Service course number)
 - (e) Coast Guard: (Service course number)
 - b. **Collocated Courses**
 - (1) Army (Service title and number)
 - (2) Navy (Service title and number)
 - (3) Air Force (Service title and number)
 - (4) Marine Corps: (Service title and number)
 - (5) Coast Guard: (Service title and number)
3. **AUTHORITY/REFERENCES (As appropriate)**
 - a. AR 351-9 (Army), OPNAVINST 1500.27E (Navy), AFI 36-2230(I) (Air Force), Interservice Training, dated _28 Aug 98_____.
 - b. Interservice Training Review Organization (ITRO) Procedures Manual, dated _____.
 - c. Standards Manual for Health Care Interservice Training, dated _July 99_____.
 - d. Interservice Training Review Organization (ITRO) Detailed Analysis Group Study Report of Findings dated _____.
 - e. DODI 4000.19, Interservice and Intergovernmental Support.
 - f. Air Force: AFI 25-201; AF Policy Directive 25-2.
 - g. DOD Directive 4165.63-M.
 - h. Other pertinent documents
4. **BACKGROUND:**
 - a. (General history)
 - b. (General history continued)
 - c. The consolidation/collocation of the (title of training) was approved by the (cite Deputy Executive Board (DEB), Executive Board (EB), and/or Defense Medical Readiness Training and Education Council (DMRTEC) meeting or specific Executive Order).
5. **GENERAL:**

**INTERSERVICE TRAINING REVIEW ORGANIZATION
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a. **SCOPE.** This MOA establishes the relationships, policies, guidelines, and procedures for the sustainment of training, training development, student and permanent part personnel support, training equipment acquisition, transfer and maintenance support, academic support, and non-academic facilities at (insert location). Actions and agreements herein apply only to the participating parties and are not intended to supersede existing regulations or agreements.

b. **CONCEPT.** Consolidated courses are jointly owned and decisions impacting this training will be made with the involvement of all participating Services. Although the parent Service controls collocated courses, changes to these programs must consider the impact on the Host Service.

c. **ASSUMPTIONS**

(1) The Service (at the host command and location) is the provider and host of the (title of training).
(2) The (participating Services), along with the host Service personnel, are the receivers of this training.

(3) Other federal and nonfederal governmental agencies may have the opportunity to obtain (title of specialty) training when properly negotiated.

(4) Services may identify specific occupational specialties impacted by this MOA.

(5) Expansion capabilities for mobilization contingencies and surge capability have been considered.

6. **AGREEMENTS/POLICIES**

a. **COURSE ADMINISTRATION**

(1) **ENROLLMENT.** Students arriving at the host command without previously being enrolled in a course become the sole responsibility of the participating Service command, including lodging and all other services, until they are enrolled in a course and that course begins. If their respective Service chooses not to wait until a course position is open, the cost of moving these students to another base will be borne by their respective service. (Enrolled in the context of this paragraph means that the student has official orders that identify the course to be attended and specifies class start date.

(2) **PERFORMANCE STANDARDS.** The host and participating Services will jointly determine and establish policies and procedures governing consolidated course-specific academic standards. These policies and procedures will be delineated in the student evaluation plan. The plan will explain and illustrate the procedures and policies affecting each student and how they progress through training and will be used as a basis for determining elimination or setback. It may include both academic and nonacademic facets. This plan will be evaluated on an annual basis and be a formal document. A copy of the student evaluation plan will be given to each student during course orientation.

(3) **TRAINING RESPONSIBILITY.** The content of consolidated courses is a mutually agreed upon set of topics that are specific in nature to the (title of training). All documentation and course control material will conform to the host standard, except as agreed to by Detailed Analysis Group (DAG) members. All course documentation will be made available to appropriate service personnel as needed. Each service has responsibility for developing, conducting, and resourcing Service-specific training in accordance with ITRO procedures. Each Service will provide required Service-specific material.

(4) **COURSE CHANGES.** Each Service will ensure other Services are provided adequate notification of any major new training requirements mandated by higher headquarters. These changes will be mutually accepted prior to incorporation in the consolidated curriculum and approved in accordance with ITRO manuals. A review/validation of the curricula will be accomplished (negotiate mutually agreed timeframe) by the host and each participating Service. Service-specific training areas will be coordinated in accordance with that Service's policies and procedures.

(5) **CURRICULUM REVIEW**

(a) Curriculum review will be conducted in accordance with the Interservice Training directive and the ITRO Procedures Manual.

(b) . NOTE: When a course is consolidated, it is owned jointly not just by the host Service.

(6) **STUDENT SELECTION.** Selection of students will be at the discretion of each Service. The Host Service will not change minimum consolidated course prerequisites for students without approval of the participating Services. Additional prerequisites and requirements may be imposed on personnel by their parent Service.

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(7) **JOINT ADVISORY GROUP.** Services may establish Joint Advisory Groups as necessary. Describe functions here if required.

(8) **STUDENT ALLOCATION.** Yearly student course allocation for each Service shall not exceed ceilings as established annually by the Services. Participating Services will submit their training requirements to the Host Service in accordance with Host Service programming cycle. Unused quotas will be turned in to the host and redistributed among the Services based on identified need.

(9) **STUDENT RECORDS.** All educational records will become and remain the property of the host. The host will provide educational record information to the participating Services.

(10) **STUDENT HANDBOOK** Develop/use as required.

(11) **TRAINING DOWNTIME.** In the event there is host commander authorized downtime in training, the course will participate if possible.

(12) **CERTIFICATES OF COMPLETION/AWARDS/DIPLOMAS.** The host shall issue certificates of completion. Academic honors criteria for awards (top/ distinguished graduate and course awards) will be applied to all students regardless of Service. These should be presented in an appropriate graduation ceremony. Certificates of course completion and awards will be entered into the student's personnel record in accordance with Service policy.

b. **STUDENT ADMINISTRATION**

(1) **DRESS AND APPEARANCE.** The standards of dress and appearance for all individuals will conform to current regulations of the parent Service. Civilian attendee's dress will comply with the host installation's policy.

(2) **STUDENT STATUS AND RESPONSIBILITIES**

(a) All students will be under the operational control of the host for academic training. All participating Service students will be afforded the same privileges as host personnel in the same category. The senior class member will be assigned as the class leader at the beginning of the course and will be responsible for maintaining good order and discipline.

(b) Students will not normally be required to perform guard, housekeeping or other similar duties. Students may be assigned these duties under the circumstances shown in (1) through (4) below. When justified by one of these circumstances, duties will be assigned to students in different Services on an equitable basis and will be commensurate with individual grades.

- 1 Students will be required to clean and maintain their classroom and living area, as well as other duties, when deemed necessary by the instructor or class leader.
- 2 When disenrolled from school and awaiting orders in a disciplinary or casual status.
- 3 During cleanup or recovery operations after an emergency.
- 4 When these duties are integral to learning objectives within the POI.

(3) **LEAVE, PASSES, AND LIBERTY.** Leave requests will be submitted through the supervisory chain of command established at the host site. Student personnel will not normally be granted leave while enrolled in the course. If the host for reasons such as holiday periods suspends academic training, students will be provided the opportunity to take leave. Emergency leave requests will be processed directly by the parent Service, in cooperation with the host. In those cases, the approving authority parent Service will notify the school commander in a timely manner. The participant Services may grant special liberty/pass with the approval of the host.

(4) **ACADEMIC DISENROLLMENT.** Failure to meet academic standards can result in disenrollment of a student. A student may be reinstated into the course only with the approval from both the host and participating Service. Disenrollment will be accomplished by the host's registrar and subsequently forwarded to the participating Service. Each Service will process disenrollments on their students. A student retains the right to address an academic disenrollment through their Service chain of command.

(5) **ACADEMIC REVIEW BOARD.** An academic review board will make recommendations on student retention, disenrollment, and remediation to the school commander. The board consists of equal representation by the appropriate Services.

(6) **NONACADEMIC DISENROLLMENT.** Situations other than academic that prevent a student from completing course objectives will be grounds for nonacademic disenrollment. These reasons can vary widely and may include such situations as emergency leave, hospitalization, or problems with conduct and suitability. The decision to disenroll a student

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normally belongs to the participating Service. The participating Service will accomplish disenrollment. The participating Service will inform the host of such action in writing, if possible, prior to any disenrollment action. Final appeal will be through the parent Service's chain of command. A student may be reinstated into the course only with the approval from both the host and participating Service.

(7) **COUNSELING.** Academic and nonacademic counseling will be conducted in accordance with the host's policies and procedures. Any staff member may perform counseling regardless of Service origin.

c. **STAFF ADMINISTRATION**

(1) **FACULTY ASSIGNMENT**

(a) Each Service will provide instructor and support staff as agreed to in the manpower review. Each Service will, to the greatest extent possible, provide 100% manning of the agreed to requirement.

(b) Each Service will recognize that the length and complexity of the training necessitates early arrival of staff to ensure no disruption of training due to lack of qualified personnel. Each Service will work towards programming the arrival of new personnel at the host as early as possible to allow for adequate indoctrination.

(c) Each Service will ensure to the maximum extent possible that instructors serve a tour of three years or more to meet mutually agreed upon instructor requirements and provide timely replacements. A staggered rotation of instructors is preferred.

(d) **FOR TRAINING HOSTED BY THE AIR FORCE:** Each Service will make every attempt to comply with the formal training requirements established by AETC in support of the Community College of the Air Force (CCAF), consistent with their Service policies and procedures. This will be a standard consideration for assignment selection and will, to the maximum extent possible, ensure that all instructors teaching CCAF degree applicable courses complete the required training. Upon assignment, instructors that do not meet the requirement will develop an associate degree plan through the education service office. All civilian instructors must have a degree from an accredited institution to be selected for instructor duty. The Office of Personnel Management (OPM) has established a minimum requirement of an associate degree for all civilian instructors (including other Services) who teach courses that result in credit toward an associate degree conferred by the CCAF.

(2) **FACULTY SELECTION.** To the greatest extent possible, selection of Service faculty should be made based on demonstrated proficiency. (Document established experience requirements here.)

(3) **FACULTY DEVELOPMENT.** All instructors must graduate from an Instructor Training course and be certified by the Host school in accordance with the command's regulations and instructions. Services will make every effort to ensure instructors complete an ITC prior to reporting for duty.

(4) **FACULTY DRESS AND APPEARANCE.** The standard of dress for all staff members will conform to current regulations of their parent Service and as dictated by training requirements. Authority for conducting formal personnel inspections will remain with the OIC of the respective Service detachment.

(5) **OPERATIONAL CONTROL OF INSTRUCTORS.** All instructor and school support personnel will be under the operational control of the host during academic hours and will not be removed or used for other functions or details unless coordinated and agreed to by their parent Service. Services may not utilize instructor personnel during academic hours without the prior approval of the host.

(6) **INSTRUCTOR STAFF AUTHORITY.** Instructors will exercise authority over the students in the class and will be under the control of the host. The instructor staff will preside over all students and be considered part of their supervisory chain of command.

(7) **INSTRUCTOR EVALUATION.** Instructor evaluation will be in accordance with host directives. Instructors who are not performing within standards will be counseled, given an opportunity to improve and then recommended for removal from their position if they do not improve. The participating Service should be informed immediately of any performance problems. The participating Service will take action to remove the instructor's qualification for instructor duty when the host and participating Service determine the instructor is unable to perform after remediation and counseling. An instructor record will be established and maintained for each instructor. This record will include an education plan for completion of

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requirements for instructor qualifications. Format of instructor records will comply with host requirements. Instructors may qualify for host/participating Services' Master Training Specialist designation.

(8) **TRAINING SUPPORT STAFF.** Each Service will provide training support staff as determined by the manpower review. Each Service will work towards providing 100 per cent support staff manning requirements at all times. (This paragraph may document specific support staff requirements above instructor requirements for each Service. This paragraph does not include BOS manpower)

(9) **COMMITTEES (If required).** Proportional representation of staff members from each Service will be assigned to serve on the various standing committees of the program, i.e., curriculum, instructional planning and development, and various review committees.

(10) **COURSE DIRECTOR SELECTION.** Services may agree to rotate the course director position and will document the agreement here. .

7. RESPONSIBILITIES

GENERAL

(1) **PHYSICAL FITNESS TRAINING.** All military personnel will participate in physical fitness training in accordance with parent regulations/directives/instructions.

(2) **FRATERNIZATION/UNPROFESSIONAL CONDUCT.** Students and permanent party personnel will adhere to DOD policies on fraternization/unprofessional conduct. All faculty, staff, and students from the participating Services will be briefed as to what this policy is and its applicability to their current assignment.

(3) **SPECIALTY BADGES.** Any specialty badges that are warranted at completion of any training program are the sole responsibility of the Service that awards the badge.

b. **THE HOST WILL:**

(1) Provide training management support for consolidated courses including, but not limited to, guidance and policy direction for training development, coordination of training requirements, and training material printing.

(2) Provide general base support in accordance with the Interservice Support Agreement (ISA)

(3) Provide and maintain appropriate training material, training aids, computers, and facilities to support training as required. The host has custody of and maintenance responsibility for all material, equipment, and supplies in support of this training. Each Service will retain custody of and maintenance responsibility for equipment in support of Service-specific training.

(4) Provide and maintain office/administrative space for instructor and administrative staff, and real property accountability. Provide equal or better office/administrative space if relocated by the Host.

(5) Brief all faculty, staff, and students on its applicable instructions, policies, and procedures. All faculty, staff and students will comply with instructions, policies, and procedures briefed by the host Service.

(6) Provide and fund any instructor training required by the host.

(7) Ensure participating Service personnel are provided adequate time to attend their Service-unique functions provided it does not interfere with school mission requirements.

(8) Administer Life-Cycle Evaluation process.

(9) Facilitate housing support for permanent party and TDY/TAD personnel on the same basis as for other personnel assigned/attached to the host site.

(10) Provide barracks facilities in accordance with reference 2g. Allow for unit integrity whenever possible. Provide equal or better facilities if required to relocate by the Host. Provide for dining facilities.

(11) Administer the Hazardous Material program.

(12) Manage the life-safety programs: (in accordance with Host directives)

(a) **SAFETY.** The host will provide safety program management and guidance for all instructors and students to include inspections, advice, and training, with particular reference to the following:

- 1 Safety requirements peculiar to this training.
- 2 Perform annual inspections (spot checks if there are "High Risk" areas). Inspection reports will be sent from the host to the participating Services in a timely manner with corrective action/follow-up noted.

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- 3 Class A/B mishap investigations will include representatives from the other Services. Subject to negotiations, a copy of all mishap reports (Class A/B/C) will be sent from the host to the participating Service(s)

(b) **FIRE PROTECTION.** The host will provide and maintain fire control, protection, and preventive programs and services to include the periodic inspection of buildings, fire extinguishing equipment, and facilities.

(13) Inform the participating Services on all administrative matters regarding participating Service personnel.

c. **THE PARTICIPATING SERVICES WILL:**

(1) Ensure that their students are enrolled in Host Services' training management system
(2) Fund any Service-unique portions of training, course evaluation, and facility requirements.

(3) Fitness/Efficiency/Performance Reports will be prepared and managed by each respective Service in accordance with applicable directive. Evaluation input is invited and expected from all supervisors toward the preparation of these personnel evaluations.

(4) Participate in the Life-Cycle Evaluation process.

d. **THE PARTICIPATING SERVICES' DETACHMENTS WILL:**

(1) Maintain all other records (personnel, medical, and dental). An emergency data card will be prepared and maintained by the host. Next-of-kin notification will be referred to the parent Service to be conducted in accordance with that Service's regulations and directives.

(2) Retain authority associated with command of their permanent party personnel and students attending this training, including, but not limited to, administrative control, pay, discipline, and military matters.

(3) Provide support to their personnel to include services for administration, logistical support, legal assistance, etc.

(4) Exercise UCMJ jurisdiction over all permanent party and student members from their Service who are assigned to or undergoing training at the host location. Each Service shall also retain special and general courts-martial jurisdiction over their personnel who are assigned to or undergoing training at the host location.

(5) Coordinate general military training requirements with the Host. If these requirements affect course training hours or require additional resources, they must be addressed in the proper financial planning cycle and be mutually approved. Resources to support these requirements are the responsibility of the Participating Service.

(6) Keep the host informed on all matters regarding their respective personnel assigned to the host location, including UCMJ-related offenses, training requirement, and other issues which are required to be addressed by all participants.

(7) The Service detachment will retain operational control of student personnel during non-academic hours.

e. **The** (other MOA signatories) will.....

8. **FINANCIAL MANAGEMENT/FUNDING:** Resources will be provided in accordance with the ITRO regulation and the standing Resourcing Rules of Engagement.

9. **MANPOWER:** Manpower requirements will be determined in accordance with ITRO procedures.

10. **SITE VISITS**

a. Site visits may be conducted by the participating Services with appropriate notification of the host. The purpose of these visits include, but are not limited to, morale checks, supervisory checks, training quality meetings, equipment adequacy, etc., necessary to ensure a high quality training environment. Unresolved discrepancies requiring corrective action will be documented and staffed appropriately.

b. Authorized representatives of accrediting agencies will be permitted to visit and observe the didactic and clinical learning environments for a reasonable period of time.

11. **AGREEMENT AND ADMINISTRATION/TERMS.** This MOA is effective upon date of last signature and will remain so unless canceled by mutual agreement, by operation of rule or regulation, or because of national security requirements. The terms of this MOA may be reviewed and supplemented, as required, by mutual consent, provided such changes are accomplished by written agreement and attached hereto. Each party agrees to review this MOA as required by any party. Failure to obtain the signatures on the MOA by all parties may be the

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basis for discontinuation of this training. Termination of this MOA will be in accordance with references 2a and 2b.

(Name)	Date
(Rank/corps)	
Commanding	
U.S. Army	

(Name)	Date
(Rank/corps)	
U.S. Navy	

(Name)	Date
(Rank)	
U.S. Air Force	

(Name)	Date
(Rank/corps)	
U.S. Marine Corps	

(Name)	Date
(Rank/corps)	
U.S. Coast Guard	

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APPENDIX E

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APPENDIX F

GLOSSARY OF TERMS

AIR FORCE SPECIALTY CODE (AFSC): An alphanumeric code that indicates an utilization/career field, specialization, and skill level (enlisted) of personnel and manpower requirements (USAF only).

ATTRITION OR ELIMINATION RATE: Reflects the number of people who enter but do not complete or graduate from a course and is expressed as a percentage.

AVERAGE DAILY STUDENT LOAD (ADSL): The average number of students on board in a course on any given day.

AVERAGE ON BOARD (AOB): The number of permanent personnel and students on board a base on any given day when averaged over a period of one year.

BASIC TRAINING (BT): Enlisted Accession Training.

CHARTER: A document issued by the Deputy Executive Board empowering and defining the organization of a Quick Look/Detailed Analysis Group to conduct a detailed analysis leading to implementation of consolidated/collocated training.

CLASS OR GROUP: A specified number of students entering a course and controlled as a unit during training.

COLLOCATION: SEE DEFINITION IN REG

CONCEPT PLANS: The plans corresponding to the preliminary consolidation/collocation training model developed by a task group in the Course Model Development stage. These plans are considered to be preliminary in nature and are developed to indicate, in general, the actions and resource requirements associated with implementing and operating a consolidated or collocated program. Any costs/(savings) associated with concept plans are understood to be only preliminary indicators.

CONSOLIDATION: SEE DEFINITION IN REG

CONSTANT YEAR DOLLARS: Dollars, which are expressed in terms of an appropriate price index for a given base year. Expressing cost estimates in terms of constant dollars removes the effect of changes in purchasing power of the dollar within a given time frame. For ITRO purposes, all prices, wages, cost factors, etc. used to determine cost estimates are those applicable for the fiscal year in which the costs are computed. If operating costs are expressed in prior year dollars, inflate to current year level.

COST AVOIDANCE: Any costs associated with programs, procurements, construction, etc. which can be prevented due to consolidation/collocation. To be considered a valid cost avoidance and be used to offset one time cost, the item must have been reviewed and entered into programming documents at the Service level (AF, Army, Marine, Navy).

COST BENEFIT ANALYSIS: An analytical approach to solving problems of choice. The analysis will determine which alternative yields the greatest benefit for a given cost, or which alternative yields a required level of benefits at the lowest cost. It may also compare the ratio of cost and benefits among alternatives. The least cost alternative applies to ITRO studies. The phrase "cost benefit analysis" is actually applicable to all cost analyses performed for ITRO purposes, but has unfortunately been applied synonymous with feasibility cost analyses.

COURSE MODEL: A training document that outlines the training core and Service unique parts of the skills, knowledge, and abilities to be attained as a result of training consolidation. It is derived from the Requirements Comparison Listing and is used to develop the consolidated course curriculum. See Notional POI.

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DECREMENTAL COSTS: Those costs, which are associated with reduced resource requirements resulting directly from consolidation or collocation. In general, the Services (except the host Service) will have reductions in manpower, equipment, facility, maintenance, operation, etc. These reductions will result in decremental costs.

DETAILED ANALYSIS GROUP (DAG): It conducts the detailed analysis with the goal of developing an MOA, implementation plan, and final cost results.

DIRECT COSTS: Cost associated directly with the training program, such as instructor or supervisor pay, training equipment, etc.

ENGINEERING METHOD OF COST ESTIMATING: An effective technique for costing new or significantly revised programs. This method involves identification of resource implications and needs in terms of facilities, equipment, manpower, materials, etc. necessary to implement and operate the new program. The cost estimates are then prepared by applying appropriate cost factors, wages, and prices to the resource changes.

FUNCTIONAL TRAINING AREA: A designated category of related training fields; i.e., Intelligence, Legal, Information Technology.

IMPLEMENTATION PLAN: A detailed plan describing how training will be consolidated/collocated.

IMPLEMENTATION PLANS: The plans corresponding to the detailed consolidation/collocation training model developed by a task group in the final report. These plans are considered to be firm in nature, following Executive Board approval, and are developed to indicate in detail the actions and resource requirements associated with implementing and operating a consolidated or collocated program. Any costs/(savings) associated with implementation plans are understood to be detailed and accurate cost estimates.

INCREMENTAL COSTS: Those costs that are associated with the additional resource requirements resulting directly from consolidation or collocation. In general, the Services (particularly the host Service) will have additional requirements for manpower, equipment, facilities, maintenance, and operation. These additional requirements will result in incremental costs.

INCREMENTAL METHOD OF COST ESTIMATING: An effective technique for performing a cost comparison between new or significantly revised programs and old or current programs, or between various program alternatives. This method eliminates the necessity for performing a full or total costing of each program or alternative. The technique requires identification of those items (manpower, facilities, equipment, materials, etc.) whose cost will be different between programs or alternatives. For ITRO purposes, this identification process concentrates on ascertaining - relative to the current individual Service programs the resource changes necessary to both get into and operate the proposed consolidated or collocated program. Cost estimates are then prepared by applying appropriate cost factors, wages, and prices to these resource changes.

INDIRECT COSTS: Costs associated indirectly with the training program, such as school overhead or base support manpower, support maintenance and operation, etc.

INDUCED COSTS: Those costs that execution of a given program or project alternative imposed on another government program. An induced cost results from competition for existing assets between different parties. For example, one unit displaces another unit during a training realignment. Any costs (case outlays) associated with the relocation of the displaced unit are attributed to the training realignment. The displaced unit's mission does not have to be related to the realignment mission for there to be induced costs assigned to the training realignment. The determinant is that there be a displacement clearly identifiable to the training realignment and resulting in cash outlays or resulting in the loss of revenue from the programmed disposition of the asset. (Sometimes the terms "imputed costs" and "opportunity costs" are used in this sense, although they generally relate to economic costs not involving immediate case outlays.) If induced costs are significant to the study, footnote the cost schedule(s) to show the costs included in the schedule(s) and the circumstances.

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INTERSERVICE EXECUTIVE ORDER. A memorandum generated by the Secretariat to document key EB, DEB, and DMRTEC decisions.

INTERSERVICE TRAINING REVIEW ORGANIZATION (ITRO): An organization of uniformed services established to improve the cost effectiveness of Service training consistent with individual Service requirements without impairing the quality of the training.

LOCKSTEP INSTRUCTION: Permits all students in a class/group to progress at the same rate.

MANPOWER AUTHORIZATION: A billet or space reflecting an established position to include such identifying characteristics as the grade (military), specialty (AFSC, MOS, NEC) and/or the specified period the position is authorized.

MANPOWER REQUIREMENTS: The amount of manpower determined to be necessary to accomplish specified tasks and workloads.

MAXIMUM CLASS SIZE: The maximum number of students per class that can be trained given existing facilities and equipment.

MILITARY OCCUPATIONAL SPECIALTY (MOS): An alphanumeric code that identifies specialty skill requirements of a position and specialty skill qualifications of individuals (USMC - officer and enlisted; ARMY - warrant officer and enlisted).

MOB: Mobilization, an increase in force levels directed by the National Command Authority resulting in increased training requirements (student throughput).

MOBILE TEAM TRAINING: Training packages and instructors exported from a parent activity and conducted on-site at other locations.

NAVY ENLISTED CLASSIFICATION (NEC): A four digit code in addition to rating designations reflecting special knowledge of skills that identify personnel and requirements (Navy only).

NAVY OFFICER BILLET CLASSIFICATION (NOBC): A four digit code that identifies a group of officer billets which are similar and which reflect qualifications of individuals (Navy only).

NONRESIDENT TRAINING: Any training not conducted in residence including that provided through correspondence/extension course developed and approved by a military Service to meet a specific training requirement of that Service for career development, skill acquisition/progression or self improvement.

PLANNED STUDENT INPUT OR ENTRIES: The number of students entered in a given course annually.

POA&M: Plan of Action and Milestones. Draft developed prior to Executive Board approval of a training option.

RECRUIT TRAINING CENTER (RTC): Center where individual accession training into a Service is accomplished.

REMEDIAL INSTRUCTION: Special instruction designed and delivered to alleviate deficiencies in the achievement of some of the learning objectives or an instructional program. Remedial training takes place over and above the training schedule.

REQUIREMENTS COMPARISON LISTING: A listing of each Service's skills, knowledge, and abilities attained as a result of attending training; used to determine commonalty.

RESOURCE REQUIREMENTS ANALYSIS (RRA). Phase II of a DAG where manpower, facilities, and cost requirements are identified for one or more options of an ITRO study or curriculum review.

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RESOURCING ROE: See Chapter 6.

SELF-PACED OR COMPUTER MANAGED INSTRUCTION: Instruction permitting individual student to progress at a rate commensurate with their abilities.

SERVICE UNIQUE: Training requirements peculiar to one Service and conducted as a separate track of a consolidated course.

SINGLE-SITE TRAINING: Training offered at only one location.

SPECIALTY SKILL IDENTIFIER (SSI): A three digit alphanumeric code that identifies the specialty skill requirements of an officer position and specialty skill qualifications of officers (Army only).

STATIC COST: Costs that are of a fixed nature that are not responsive to changes in the workload over a relevant range.

STUDENT TO INSTRUCTOR RATIO: The maximum number of students taught by one instructor for a specific topic considering equipment, safety and quality of training.

SUNK COSTS: Costs associated with a past decision, which cannot be influenced or changed by the proposed ITRO process, are considered "sunk" costs. For example, a new training class is required and the proposed method of instruction is satellite transmission to four remote sites. Three of the four sites have already ordered satellite equipment for other purposes that can be used for this training, as well as for the other purposes. The cost of the equipment is considered sunk because it has been purchased already and will be used regardless of this training consolidation/collocation. The fourth location would have to include the cost of the satellite system as an incremental cost because it would have to be purchased for this course. Also, any materials, equipment, parts, etc., which will be made surplus due to consolidation or collocation are considered to be sunk costs and in general cannot be considered as savings. If surplus assets have value and can be disposed of with gain, the gain net of disposal cost is a savings.

SURGE: A temporary increase in training requirements.

TRAINING REQUIREMENT: The number of personnel required to be entered into training to meet commitments of the military services concerned.

TRAINING SITUATION/INSTRUCTIONAL METHOD: Method of instruction employed to present a phase or phases of the course curriculum; i.e., classroom/lecture, lab, practical exercise.

VARIABLE COST FACTOR: A factor which, when multiplied by the relevant workload, determines the variable cost